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LITERATURE REVIEW

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Improving market institutions and urban food supplies for the urban poor: a comparative study of Nigeria and Zambia: scoping phase

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1. INTRODUCTION

The aim of this review is to identify knowledge gaps and provide appropriate background material for a proposed full-scale study of market institutions and urban food supply across Nigeria and Zambia. The paper was prepared in draft form prior to our pilot field studies with our local collaborators in Jos, Nigeria, in January 2004, and in Lusaka, Zambia, in February/March 2004. It thus helped to guide both those pilot field studies and also the discussion at the workshops for policy makers, academics and practitioners subsequently held in Abuja and Lusaka. It has since been extended with additional grey literature accessed during the country visits.

To make markets work for the poor requires greater understanding of existing market systems. The research problem addressed in this project is the lack of specific knowledge and understanding of formal and informal market institutions in urban Africa and their impact on urban food systems. In particular this project examines the systems which govern the marketing opportunities for informal urban and peri-urban cultivators (a widespread activity for the urban poor.) Our study also encompasses reference to rurally produced food and the mechanisms of marketing this in urban areas.

Our focus is thus on the mechanics of urban food supply systems and the role of urban markets in regulation of the agricultural produce trade. We explore the linkages between producers (urban, peri-urban and rural), traders and urban consumers, paying particular attention to the functioning of formal and informal market institutions. We take institutions to be “‘rules of the game’ defining the incentives and sanctions affecting people’s behaviour” (Dorward et al. 2003:323), and recognise that they are deeply embedded in social and political practices.

Despite rapid urbanisation and increasing levels of urban poverty, urban food systems are rarely adequately considered in African urban development studies (Drakakis-Smith 1990, Smith 1998) although a few excellent but mostly rather dated case studies exist. Guyer's (1987) edited collection 'Feeding African Cities' is perhaps the most notable example with its specific urban case studies of Salisbury (Harare), Dar es Salaam, Yaounde and Kano (Nigeria). However, these are principally historical in focus. [Guyer (1997) went on to produce a specific study of Ibadan's food supply but this only covers the period up to 1988]. Dar es Salaam has been studied in terms of food supply and marketing particularly by Bryceson (1987, 1992, 1993), and Harare's supply systems were well researched in the 1980s (Drakakis-Smith and Kivell 1990, Smith 1989, Horn 1994). Other studies which include consideration of urban food supply and marketing include Mbuyi (1989) and Iyenda (2002) on Kinshasa, El Hadi Abuy Sin and Davies (1991) on Khartoum and van Donge (1992) on Dar es Salaam. Work on the general situation of urban food supplies and the policy response in Africa has also been reviewed by Ellis and Sumberg (1998). This paper emphasises the analytical and policy importance of rural-urban interactions and the dangerous tendency to downplay or to neglect these interactions in determining access to food and welfare by the urban poor.

An enormous body of work exists on urban agriculture in African cities and this frequently contains consideration of the extent to which crops are marketed within

the city: indicative references, some of which are Africa-specific and some of which have African case study material included, are Bakker et al (2000), Chimbowu and Gumbo (1993), Egziabher et al (1993), Freeman (1991), Hovorka (1998), Maxwell (1995), Mbiba (1995, 2000), Mlozi (1996), Obosu-Mensah (1999), and Rogerson (1992). However, while the role of urban agriculture in providing food for urban people has increased very significantly in the 1980s and 1990s (although exact figures on the contribution in individual African cities are hard to find), the main thrust of the research is either on its contribution to the urban household's livelihoods in terms of self-provisioning and the generation of some possible sales income, or on its impact on the urban physical environment (eg see Bowyer-Bower and Smith 1997). The exact nature of trading and marketing arrangements is rarely the main consideration.

Other work on urban livelihoods has also generally failed to generate such studies on the role of urban food markets, although such work abounds with analysis of the impact on livelihoods of increases in the cost of basic foods under structural adjustment. As Dorward et al. (2003) point out, despite the prioritisation of a sustainable livelihoods approach by DFID in recent years, this has encompassed remarkably little consideration of the role of markets and market institutions in livelihood development and poverty reduction. However, calls are now being made for donor assistance with improved institutions (contract law and enforcement, systems of grades and standards) (see Kelly et al. (2003) in an agricultural inputs context). A useful exception is recent work by African and Swedish scholars brought together by a Nordic African Institute (2002) conference which focussed on interactions between gender, urban governance and markets in Africa, including the relation between the state and market traders, and provides case material from fourteen different studies. A number of publications are planned in the NAI's Research Report series, including one on the theme of 'Feeding the cities'.

There is a wide range of highly complex formal and informal institutions that shape Africa's food marketing systems: different types of associations and self imposed rules, in addition to national legal systems that affect how trade is done. We need to know more about how these formal and informal regulatory systems operate, if we are to improve access by all producers to suitable markets and thus enhance urban food supplies, and also secure income and livelihoods. Dorward et al. (2003), drawing on earlier literature, usefully identify key concepts which we aim to examine in some depth in our empirical research:

1. The distinction between the institutional environment and institutional (or contractual) arrangements.
2. The interaction of institutional environments and institutional arrangements with property rights, information flows, transaction costs, transaction risks, and market access failures for market participants.
3. Processes whereby institutions change.

There is a particular need for knowledge about how food marketing systems operate in order to assist and support the growing number of urban and peri-urban food producers and producer-marketers now in existence, who commonly wish to access established urban food market systems. While there have been many useful studies of urban and peri-urban agriculture over the last decade, marketing issues for urban and peri-urban producers have tended to receive little attention.

Traders are often accused by politicians and the media of operating cartels, but anecdotal evidence and our own field experience in Africa (Porter 1994, 1995, 1998, 2001; Lyon 1999, 2000, 2001) suggests that, although monopolistic control can be exerted, it tends to be confined to specific parts of the marketing chain. An important recent study led by Fafchamps (2001) comparing Benin and Malawi confirms this view in those countries: they document the 'absence of speculative, inter-seasonal storage for the overwhelming majority of traders, and the relatively low returns to storage in general' (Fafchamps 2001:38). Traders obviously provide a crucial service and they are often investing their capital in a high-risk environment where, arguably, returns should be commensurate with the risks involved. This is, of course, even more true of farmers themselves, and evidently a balance needs to be struck between the conflicting interests of the producer and the trader which allows both to profit if food marketing is to develop and be improved. Fafchamps (2001) argues that rudimentary business practices found in Benin and Malawi can be largely blamed on transaction risk. Since payment takes place at delivery, this precludes invoicing and payment by cheque and complicates accounting. 'Business networks have developed as a partial palliative to these problems, but they are insufficient to eliminate them' (ibid p.39).

The positive contribution of traders in providing an essential service to urban consumers has not been adequately analysed, perhaps in some cases because it is taken as 'read' by policy makers and analysts, in the same way as the role of other service providers who are operating for profit. However, there has been long-standing antipathy among many policy makers in post-independence Africa to small-scale trading, in particular, as evidenced by the innumerable cases of harassment reported in the African press and by the derogatory terms often used to describe traders and their trading activities. In part this can be explained by the disorganised nature of informal trade and the difficulties it presents as such for regulators in areas such as hoarding, unfair pricing and even city traffic flow. Dennis (1987) refers to numerous incidents during Nigeria's economic crisis in 1984 when soldiers went into markets and beat women traders to force them to sell their goods at lower prices. Given the constraints so often described in studies of marketing in Nigeria (Smith and Luttrell 1994; Porter 1994a; Lyon 2001), the ability of the traders to move produce from millions of disparate farms to millions of consumers in Nigeria and internationally is astonishing. Within these difficult conditions traders have built up the skills and capital necessary to perform these services.

The contribution of traders is more specifically recognised by policy makers when government involvement in food and other crop trading has been 'rolled back' and it has been found that private traders have *not* filled the ensuing vacuum in a geographically equitable fashion, even when this was entirely predictable according to the logic of the market in countries with very poor transport infrastructure. This has been a major issue in Zambia since the food trade was finally properly liberalised in the 1990s (Republic of Zambia 2001, Seshamani 1998). Similar problems have arisen in Malawi (Harrigan 1991). Nonetheless, across the continent, '[markets] may not be working optimally, either for livelihood or for development, but they are delivering goods on a regular basis and distributing resources' (Guyer and Hansen 2001:199).

The central role of women in trade, including food trade, as the foundation of urbanization in Africa is widely recognised in the academic literature and is discussed

in some detail in section 3.1. It is the key theme of Sheldon's (1996) edited volume, *Courtyards, markets, city streets: urban women in Africa*. This central female role in trading, notably food trading, is also the focus of House-Midamba and Ekechi's (1995) edited book on *African market women and economic power: the role of women in African economic development*. The role of food trade in providing sustainable livelihoods for urban women throughout Nigeria is emphasised in four of the studies in this book (Obgomo 1995, Falola 1995, Ekechi 1995, VerEecke 1995) and in numerous other past studies in southern Nigeria, in particular (Onyemelukwe 1970; Sudarkasa 1973, Trager 1981a, 1981b), and elsewhere in West Africa (Clark 1994, Dennis and Peprah 1995, Grieco 1996).

The role of trade, including food trade, in women's livelihoods in southern Africa is much less culturally and historically rooted. The central role of market women in West Africa has no regional equivalent there. In part this may well be because urbanization itself, in southern Africa, is a more recent phenomenon with its roots firmly in the colonial period. The cultural and political factors underlying differences in women's participation in such trade in an East African city, Nairobi, by contrast with Accra in Ghana, have been highlighted in a study by Robertson (1995). The differences in colonial governments' attitudes towards urban women in West and East Africa are shown to play a part, as well as the more longstanding pre-colonial differences in women's accepted socio-economic roles. Certainly similar points would be true for comparisons between Zambia and Nigeria.

A key element in our approach to understanding market institutions and urban food systems research is the need to consider the roles and actions of all actors. In addition to consumers and producers, this includes market intermediaries such as traders, transporters and other people who make a livelihood from the marketing system. These can be key players in improving the marketing systems that supply urban consumers (rather than merely hindrances). Our aim is to discover and disseminate best practice.

Our research objectives for the field component of a proposed larger study are:

- Map the food system/chain/network for selected commodities
- Identify the market institutions and regulations and associated factors which currently shape food supply to and within urban areas.
- Examine how institutions have evolved, how they manage to sustain themselves, and why they fail to succeed in certain contexts.
- Identify good practice which can contribute to improved marketing systems, improved urban food supplies, more secure income opportunities and associated poverty eradication
- Make recommendations for improving marketing systems in case study locations

In the literature review which follows we draw particular attention to material published over the last decade, but also refer to earlier literature where this has not been superseded. **Individual sections are concluded by a summary of key issues. These are brought together for ease of reference in the concluding chapter of the report.**

2. FOOD SYSTEMS RESEARCH IN NIGERIA AND ZAMBIA

The food supply to urban areas in Africa is based on a diverse range of producers, traders, intermediaries, and consumers, all of whom operate within a broader context of local, national and international formal and informal institutional constraints and influences. An understanding of food systems can be facilitated by mapping the interactions of people involved along the chain. Commodity chains or ‘filieres’ differ from commodity to commodity and may change shape seasonally. The operation of, and participation in, these food systems has an impact on poverty in three ways: they influence income available to agricultural producers, food costs for urban consumers and finally income opportunities for traders. However, the interests of each of these groups of stakeholders are frequently contradictory.

Analysis of food systems through commodity chain or commodity network mapping has become increasingly attractive to researchers because it implies a more holistic approach to agricultural production and marketing issues and draws attention to both the global context in which local food systems operate and also to local socio-political influences which shape power relations and affect the way trading benefits are distributed. Mapping commodity chains thus requires attention to a broad spectrum of issues, including inputs and labour as well as crop outputs. It considers production, circulation and consumption of goods. The analysis will include the roles of different actors along the chain and the functioning of institutions, both formal and informal. It will consider the extent of competition and cooperation and way these are shaped by local, national and global socio-political and economic factors (Goodman and Watts 1997).

In the sections below we introduce the general literature on agricultural marketing in Nigeria and Zambia, discuss the limited availability of specific studies on the mechanics of urban food supply and review the range of stakeholders who commonly help shape African food supply systems. We conclude by returning to the issue of commodity chains as an approach to food systems in Africa and their potential value for our scoping studies.

2.1 General literature on agricultural marketing in Nigeria and Zambia

There is an extensive general literature on agricultural marketing in Nigeria in the post-independence period which, though mostly old, provides useful pertinent background to understanding current broad conditions (for example Anthonio 1968, Jones 1968, Thodey 1968, Olayemi 1974, Mortimore 1979, Delgado 1986, Ariyo 2001). This helps provide important historical perspectives on areas such as the gender and ethnic components to marketing, commodity chains and trader-state relations and past experience with market interventions.

More recent material comes from studies of urban and peri-urban horticulture in Enugu (Onah et al. 1998) and Kano (Olofin et al. 1998), which include very brief reviews of marketing. There is also material from other West African countries, which has relevance to Nigeria (e.g. van der Laan et al 1999). In particular, there is much recent published research on matters related to agricultural marketing in Ghana (including work in our crop post-harvest project R7149: Porter 1998, Lyon 1998 etc.)

By contrast, general background material on agricultural marketing in Zambia and other southern African countries is more limited than that available for West Africa. We thus review what is available in more detail. It often has a specifically rural focus (for example Ponte's recent Tanzanian study, 2002) or is restricted to issues such as smallholder outgrowing schemes (e.g. Stringfellow 1996 for Zambia, Govereh et al. 1999 on eastern and southern Africa). Fafchamps and Minten (IFPRI 1998), however, provide interesting studies on relationships and traders in Madagascar and work on the supply of urban markets in Dar as Salaam by Bryceson (1987, 1992, 1993), Briggs (1994), and on Harare by Mosley (1987), Horn (1994), Drakakis-Smith and Kivell (1990) and Smith (1989) is also notable. An earlier work for colonial Salisbury also exists by Cheater (1979) which specifically refers to African smallholders' production and marketing of food for the city. Cravinho (1998) looks at the politics of agricultural marketing in Mozambique. Whiteside (1998a, 1998b) provides a comprehensive overview of smallholder agriculture in most of the countries in the southern African region, including specific consideration of Zambia and of marketing arrangements which is a useful comparative source. An earlier regional collection on food policy is by Mkandawire and Matlosa (1993).

A key reference for Zambia is a review of markets and trade in the Copperbelt conducted as far back as 1959 (Miracle 1962). Miracle (1962:705) suggests that the first use of market places in this region may have come with European trader responses to the foodstuffs demand created by the development of mining centres. By the time Miracle carried out his study maize, millets, sorghums, grain, meals, salt, sugar, coffee and tea could not be sold legally in most market places by Africans. He suggested that the grain sale prohibitions were designed to disguise a subsidy to European farmers. This reflects the important difference in the colonial experience between Nigeria and Zambia already noted ie that African marketing in Zambia was actively, and institutionally, undermined in order to protect large-scale European farmers from competition. (Nigeria, by contrast with Zambia, retained vigorous traditional periodic market systems which interlinked regions across the whole country: this is well documented).

Important contributions to the literature on agricultural policy generally in Zambia were made by Bates (1974, 1976, 1981) and Bates and Collier (1993). Bates was one of the foremost proponents of the idea, later adopted by the World Bank as a key element of their structural adjustment programmes in the 1980s, that a key distortion in African economies was urban bias and the neglect of agricultural development. Zambia was used as the central case study in these studies. However, as noted already, the studies were based on a very misleading conception of Zambia's urban/rural situation. In fact, by the end of the 1970s, long before structural adjustment, urbanization had slowed dramatically and many of the Copperbelt towns were experiencing net out-migration to rural areas (see Potts 1995, 2004). The most authoritative overview of Zambia's agricultural policies, including marketing, before the fully liberalised 1990s is Wood et al (1990).

Most of the recent literature on agricultural marketing in Zambia has focused on maize, the main food crop (e.g. Chizuni 1994; Mwanaumo et al 1997; Seshamani 1998, Pletcher 2000, Mwiinga et al 2002; Nijhoff et al 2002; Nijhoff et al. 2003, Oygard et al. 2003), though Moll and Dietvorst's (1999) work on cattle marketing in Western Province over 30 years provides a rare perspective on private trading

activities and highlights the 'continuous search for the demarcation of the roles of government and private sector in society' (p. 201). There are also Zambia-specific contributions in collections assessing the impact of SAPs on agriculture or specific case studies from Zambia (eg van der Geest 1994, Geisler 1992, Holden 1997, Joy 1993, Kean and Wood 1992, Chimika Mwana 1993, Valdes and Muir-Leresche 1993). The majority of this literature focuses on food security. While some of this literature ignores the urban component, some considers it very specifically, but only in terms of the distortions in market pricing of maize brought about by government interventions in the maize market because these are usually seen as being in the unwarranted interests of the urban population (this is discussed in detail in section 6.1)

Although private traders operate in urban food supply systems in Zambia their detailed activities appear to be almost wholly unrecorded, because of the preoccupation with government interventions (and the marginalisation of private traders which has been partly their cause and partly their consequence). Consequently there is a major knowledge gap to be filled. However there is a recent major study of the transfer and use of agricultural market information in Zambia based on assessment of user needs by the Food Security Research Project (FSRP) which is run in collaboration with Michigan State University (Chomba et al. 2002). This researched the stated needs of traders, large-scale farmers, millers and other food processors, small-scale farmers and relevant CBOs. Thus, while it does not focus on the urban end of food marketing, it does provide extremely useful information on the mechanics of food marketing more generally. For smallholders it is clear from this study that nearly all of them sell to traders who come to their villages. Transport costs prevent most from taking food direct to markets because rural periodic bulking markets of the type widespread across Nigeria are absent in Zambia. The small farmers' main concern was that they were price-takers; they found it very hard to negotiate with the traders as they were ignorant of the real costs that the latter claimed determined the prices they could offer (ie transport and prices at the mills for maize). They very much wanted a floor price for maize to be re-introduced. Whether traders are really being unduly exploitative was not investigated, however, and this is clearly an important issue. Anecdotal evidence in Zambia suggests that this is a common problem. Furthermore a ZAMTIE report, discussed in section 6.1, which is certainly not anti-trader, states that while very few traders go out to the small-scale farmers, 'those that do are often in a position to buy at piratical prices' (le Clus and Mwale, 2004, p. 4).

Dorward et al.'s (2003:324) conceptualisation of the low-level equilibrium trap in which low levels of economic activity lead to thin markets, high transaction costs and risks, and high unit costs for infrastructural development (and are underlain by a fundamental coordination problem), initially developed through analysis of the Malawian situation, appears pertinent in this context. However Malawi is small, and very densely populated, in comparison to Zambia and thus the sorts of problems identified are likely to be writ larger in Zambia. There is plenty of work on Zambia which identifies the lack of private traders in inputs and outputs choosing (for obvious, sound reasons), post-liberalisation, to operate in areas relatively distant from markets and reasonable transport links, and the consequent significant drops in income and welfare of the smallholders in such areas.

2.2 Mechanics of food supply to contemporary urban markets

There is limited detailed reference in the broad agricultural marketing literature for either Nigeria or Zambia to the actual mechanics of supply to contemporary urban food markets, and to the role of those markets in the regulation of the agricultural produce trade. In Nigeria, studies which encompass the mechanics of urban food supply and their role in regulation of the agricultural produce trade are now principally of historical interest. Even Guyer's excellent work on Ibadan (1997) needs updating, because it extends no further than 1988.

Chomba et al (2002) go some way to fill this lacuna for Zambia, but they do not differentiate between commodities and do not cover intra-urban marketing. The role of women in food production for the market and in food trading in Zambia was the theme of a government-run seminar held in 1984 and the collected papers provided many insights into the marketing system then (Chilivumbo and Kanyangwa 1984). However the papers are rather short, many of them remarking that further research was necessary, and they examined a period before liberalisation, when UNIP was in power, so the recommendations tend to point towards co-operatives and price controls etc. Again, the contemporary context is obviously very different.

2.3 Power relations within urban food markets

An understanding of the activities and power relations within urban food markets (as opposed to linkages along the filiere, discussed further below) is vital to a full appreciation of the complexity of the marketing system. There have been a number of past studies in Nigerian city markets which can still provide important specific context on urban trading (e.g. Sudarkasa 1973, Trager 1976/7, 1981, 1985, Karanja 1987, Lyon 2001). Comparable studies for Lusaka are few in number. Geisler's (1992) study of women in the agricultural sector in Zambia focuses mostly on labour.) Miracle (1962) provides some useful insights on foodstuffs trading in Copperbelt towns. His small description of the vegetable trade suggests some vegetables were sold directly by urban producers from their gardens, and retailers visited producers on the urban periphery to purchase directly. It was not uncommon at that time for Africans to buy from European farmers, nor for European farmers to send their employees to sell vegetables in African markets.

2.4 Stakeholders in African food systems

Stakeholders commonly involved urban food supply systems, according to the literature, are shown in the table below.

Stakeholder	Principal Role	Broad gender patterns M= mostly male, f= mostly female	Involvement in food supply to the urban poor
Farmers	Food production	Nigeria: m/f Zambia: f	Major in Nigeria Varies seasonally in Zambia
Assemblers	Assembly	Nigeria: m/f Zambia: ?	Major in Nigeria Zambia?
Commission agents	Brokerage	Nigeria: m Zambia: ?	Major in Nigeria Zambia?
Sedentary traders	Bulking and direct sale	Nigeria: f/m Zambia: ?	Major in Nigeria Zambia?
Itinerant long-distance traders	Assembly and distribution	Nigeria: m Zambia: m	Major in Nigeria Zambia?
Urban market wholesalers	Bulking and distribution	Nigeria: m/f Zambia: m	Major in Nigeria Major in Zambia
Urban market retailers	Direct sale	Nigeria: f/m Zambia: f/m	Major in Nigeria Major in Zambia
Street hawkers	Direct sale	Nigeria: f Zambia: f/m but used to be mainly f	Major in Nigeria Major in Zambia
Urban house-based retailers	Direct sale	Nigeria: f Zambia: f	Major in Nigeria Zambia?
Urban petty food processors	Processing and sometimes direct sale	Nigeria: f Zambia: f	Major in Nigeria Significant in Zambia
Urban large-scale food processors/ Millers	Processing	Nigeria: m Zambia: m	Greater in Zambia than Nigeria
Urban large-scale retailers (supermarkets)	Direct sale	Nigeria: Zambia:	Nigeria: Indirect but may be substantial for certain items (imported and local) Zambia: increasing rapidly /south African
Consumers	Consumption		N.A.

This table focuses on stakeholders who handle goods as they move along the commodity chain or network. Other important stakeholders commonly include central government (both through policy and sometimes direct intervention), local government (in terms of policy, regulation and infrastructure provision), and traditional authorities (who may play a variety of roles, particularly through their position as land holders).

2.5 Mapping commodity chains/networks

Clearly the supply of agricultural produce to urban markets lies at the heart of the agricultural marketing system in Nigeria and Zambia as elsewhere: it is crucial both to rural producers and urban consumers (a point emphasised for developing countries as a whole by Mittendorf as long ago as 1978). Mapping of current market interactions along individual commodity chains is needed, both through to urban areas, and within urban markets, taking into account the nature of power relationships which shape the system. It should include consideration of both ethnicity and gender. This is necessary before detailed policy recommendations are made which might cause adjustments within individual commodity chains.

A notable contribution to this field comes from Guyer (1997) on Ibadan's food supply hinterland, mentioned above, which illustrates the crucial significance of urban food supply patterns. The importance of urban food supply patterns is also emphasised in recent work on African commodity systems outside Nigeria which focuses on crop 'filieres', i.e. sequences of relationships/channels along which food moves through urban provisioning systems and which emphasises gradations of power evident at key links in the chain of connections (eg. Bernstein 1996 for South African maize, Mather and Greenberg 2003 for citrus fruit in South Africa, Love 2001 for Ethiopia's coffee.) Much recent attention has been given to such commodity chains, and in some cases this incorporates detailed attention to the activities of urban (as well as rural) traders and the power relationships which shape the marketing system. However, Smith (1998) argues that such food systems studies tend to focus on globalisation and to underplay the specific role of urbanisation within both global and local trends.

The potential for the approach to incorporate urbanisation issues is illustrated by Hartwick (1998) in a non-agricultural context with reference to gold in southern Africa. Research on vegetable production on the Jos Plateau, Nigeria (in our Crop post-harvest R7924 study) demonstrates the complexity of networks among producers and different kinds of traders, with chain and associated credit systems extending through Jos to the major urban markets of southern Nigeria, supported by landlord relationships which are built over long periods (Porter 2001, Porter et al. 2003). The entrenched but flexible and evolving nature of the landlord system is evident from the extensive historical literature on this topic in West Africa but the way it is being adapted to current circumstances needs examination.

Jackson et al. (2003) suggest that commodity chains are subject to a proliferation of diverse and inconsistent definitions, and note the importance of historical depth to commodity chain analysis and the need for improved handling of regulation issues. Use of the term *network* is preferred by some authors because it more explicitly captures 'the complexity of actors and multi-stranded exchange relationships' (Hughes 2000; Hughes 2001:391). Hughes' study of the Kenyan cut flower industry (2001) provides a useful example of the way the concept can be utilised to examine organisational geographies of business responsibility: in this case the shaping of the regulatory role of the Kenya Flower Council and its code of practice and their impact on labour conditions and other practices.

Chain/network analysis, we decided, could prove helpful in our scoping case studies by utilising the approach for a selected commodity per case study location, in order to identify many of the aforementioned factors (both constraints and facilitating factors)

which influence broader urban food supply patterns. This would allow us to identify sequences of relationships along which food moves through urban provisioning systems and to emphasise gradations of power and patterns of regulation evident at key links in the chain of connections (Bernstein 1995, Love 2001.) Our aim is to avoid the narrow economic view which is often characteristic of commodity chain studies, and to give full recognition to the social implications (Rammohan and Sundaresan 2003).

Key questions on commodity chains/networks

- How do individual commodity chains work through from rural, peri-urban and urban producers to rural consumers?
- What are the implications for the livelihoods of the urban and rural poor?
- What roles are private traders currently playing in the urban food supply system in Zambia, particularly at the urban end of the chain where there is less information? What institutions and types of regulation shape their activities?

3. GENDER AND ETHNICITY IN MARKETING SYSTEMS

3.1 Gender issues: trading and sustainable livelihoods for women and men

A substantial number of detailed case studies have been made of women's role in foodstuffs trading in Nigeria. Most were conducted between the 1960s and the mid-1980s and thus pre-date the major economic changes of the late 1980s and the 1990s (years marked by a reduction in both internal and externally funded academic research of all kinds in Nigeria). Nonetheless, these earlier studies emphasise the diversity of local cultural contexts in Nigeria and the massive impact of local gender relations on women's participation. They also emphasise the critical importance of women in the urban produce and cooked food trade. The extremes are represented by studies of secluded Hausa women traders operating from their compounds in Kano (notably Calloway 1987, Pittin 1984, 1991) and Yoruba women entrepreneurs travelling long distances for trade (notably Sudarkasa 1973). However, a simplistic association of gender patterns of trade with religious affiliation needs to be avoided, as is illustrated by studies in Borno and the Jos Plateau (Porter 1988, 1995).

More recent empirical studies, reporting research conducted since the late 1980s in Nigeria, is sparse. Wan's work on women gari traders in Ibadan, based on fieldwork from 1992-4 (Wan 2001), is particularly useful because it focuses specifically on supply of a staple commodity, cassava, to urban markets and shows its significance both for the urban food economy in general and also for women's incomes and status in particular in the fairly recent past. Izugbara (2004) reports specifically on micro-lending to women in south-eastern Nigeria, a trend which might be anticipated to increase women's empowerment, particularly through participation in the urban food supply system. Her findings suggest that while the schemes do help poor women's access to incomes, they are not having any impact on gender relations and women's subordination. Research elsewhere in West Africa, notably in Ghana, has provided more detailed information on women's continuing significance to the urban food trade and provides important material for potential comparative studies (see for example, Levin et al 1999).

Research on gender issues and women's trading role in Zambia has been less well documented. Miracle's 1959 survey in Rhodesian Copperbelt markets (1962) found just over half the interviewed sellers were male and of diverse ethnicity. Most of the larger scale traders were men trading fish. (Maize, the most important staple, was officially unavailable to local trade at that time, being marketed through government stores: resale of maize in markets was illegal.) Thirty-four tribes were represented and only five accounted for 5% or more of the sellers: the Bemba were most strongly represented at nearly one-quarter of the total trader survey sample. Miracle attributes this to the limited agricultural potential of their homeland areas. The significance of women in food marketing in Zambia since the 1980s, if not before, is clear from Chilivumbo and Kanyangwa (1984).

There is more contemporary information with better material on gendered labour divisions in Lusaka's formal and informal markets in the post-liberalisation 1990s in Blunt (1997) although this does not focus on food marketing alone. In her study she found that the sale of vegetables and cooked maize (*nsima*) were the main activities in the informal markets, accounting for well over half of all activities; but while

vegetable selling was the most frequent activity in the formal market surveyed, food sales overall did not dominate the market trade. Food sales were clearly dominated by women. Women were also more likely than men to be employers in the formal market, but the situation reversed in unofficial markets.

There are also a number of studies which highlight the importance of trading in food, particularly small scale selling within towns, for urban women in the southern African region and the fact that the role of food trading in women's livelihoods has greatly increased under the impact of structural adjustment. Harare and Zimbabwe generally are well served by studies (Cheater 1979, Smith 1989, Horn, 1994, 1995, Mupedziswa and Gumbo 1998, Osirim 1994, Rakodi 1994, Zhou 1995). Schlyter's longstanding work in the region on gender, housing and livelihood issues often provides insights into the importance of the informal sector and food sales for women (eg Schlyter 1989 on Harare; Schlyter 1990 on George, an informal settlement in Lusaka). Preston-Whyte and Rogerson's (1991) collection on the informal sector in South Africa also includes consideration of this issue and the biographical study by Mathabane (1994) is replete with evidence of the significance of food trading for very poor women in Johannesburg over three generations.

A specifically gendered study on household responses to poverty in Lusaka by Moser and Holland (1997) is also relevant. A particularly noteworthy contribution to the Africanist literature is Nelson (1997) on Nairobi which provides the best longitudinal analysis available of the gendered impact of globalization in Africa on informal sector traders, including food traders. Rakodi's (1991) broad analysis is also worth noting for injecting a note of caution about the very low incomes often associated with informal sector food trading for women.

Work in Tanzania by Tripp (1990) has documented the rapid increase in women's involvement in the informal sector post-structural adjustment and much of this has been in food trade. Much of the work relating to urban food supplies and marketing in southern and eastern Africa (eg Bryceson's Tanzanian studies; Jose Smith's (1989) and Nancy Horn's (1994) work on Harare) also specifically considers women's important roles in food trade. Other studies on women's increasing involvement in informal economic activities in southern and eastern Africa are quite common (eg on Chawama, one of Lusaka's low-income settlements, see Moser (1997); on Harare, Brand 1986, Osirim 1994, Mupedziswa and Gumbo 1998; on Kinshasa, Iyenda 2003; on Nairobi, Nelson 1997; on South Africa, Preston-Whyte and Rogerson 1991). However, again these studies do not look at food traders specifically, although the significance of raw and cooked food trading and vending for women is always an element in these works. It is clear therefore that the significance of women in food trading in cities is well established in southern and eastern, as well as West Africa, although details on their roles within that sector are less documented.

3.2 Ethnic and other trader alliances

Many of the relationships which support the extended chains of distribution of produce across the country depend on links through the ethnic diaspora based on shared understandings and values, but others are embedded in alliances with other ethnic groups which from time to time are made vulnerable by ethnic tensions. An appreciation of the significance - and occasional vulnerability - of these linkages is crucial to a full appreciation of Nigeria's marketing structures and their operation.

Ethnicity is not, however, mentioned in any of the recent literature on agricultural production and marketing as an important issue in Zambia. .

The ethnicity of traders is often different to the producers they buy from in Nigeria, with certain ethnic groups specialising in particular parts of the chain (Onokerhoraye, 1977). Thus Adubi (1996: 18-19) notes the domination of the Hausa in wholesale markets for cereals in Lagos. Their produce will be sold on to Yoruba and other ethnic groups engaged in secondary wholesale and retail trade, and directly to consumers. He suggests that the Hausa are able to dominate the wholesale cereal market because of their access to credit arrangements unavailable to others: i.e. they can purchase goods on credit from the Hausa producers and suppliers in northern Nigeria. The Hausa also play a significant role in vegetable (tomato, onion, pepper) selling in Lagos, where Hausa dillalis (commission agents) work in collaboration with their Yoruba counterparts (ibid: 20).

Attempts to change the marketing system can have serious repercussions and has been related to recent ethnic conflicts in Nigeria. Ethno- domination of marketing channels is common in many countries (Speece 1990) and represents one of the most sensitive areas for research. Recent work on the Jos Plateau (Porter et al 2003) confirms this view. Consequently, we will need to proceed with caution in this component of the study.

[It should be noted that Okali et al. (2001:51) suggest that policies aimed at ethnic or geographic balancing in Nigeria have contributed to the large population of young street hawkers in urban centres of southeastern Nigeria: they are commonly school drop-outs who have been frustrated by such policies applied to university admissions etc.]

Key questions on trader roles

- How are current trader patterns gendered in Nigeria and Zambia? To what extent does this gendering impact on formal and informal institutions? [refer to gaps in the table] What are the implications for gendered livelihoods?
- How does ethnicity shape current marketing patterns? Can excessive ethno-domination be mediated/regulated by formal/informal institutions?

4. FACTORS CONTROLLING MARKET ACCESS

The ability to trade in food requires access to transport and lorry parks, selling spaces in markets, credit, information on prices and supplies (which may not be available). Our study aims to explore the factors that allow access and the factors that exclude access, and the implications of these for urban poverty, the security of urban livelihoods, and the security of urban food supply. The potential for improving price information and bargaining procedures for both large and small scale urban producers and traders will also be considered.

4.1 Access to selling spaces in markets, especially for poor producers and producer-traders

The power to control prices and supplies depends on the ability of market associations to act as cartels. This often depends on their control of key market spaces in urban areas and the ability to control who buys from rural areas. This has been found in many West African markets (Smith and Luttrell, 1994; Lyon, 2000a). However, there is likely to be considerable difference between markets and within markets depending on the commodity.

In Nigerian urban markets, Anyanwu and Jukes (1991) observe the way small traders may themselves choose relegation to sites outside the main market in order to avoid payment of market dues. Okali et al. (2001:46-7), however, also record rural producers in south-eastern Nigeria experiencing difficulties in accessing urban markets: *“rural respondents complained that the market unions in the city do not allow the rural farmer to sell his products directly to consumers.... even if the rural farmer transports his farm produce to the urban centre, he is forced to sell to the foodstuff unions in the urban market or else members of the union will frustrate the rural farmer’s efforts to sell his produce. Understandably, this results in a substantial loss in potential income for the farmer who is forced to sell to the urban market unions at a much lower than the retail price”*. Their study is a general examination of urban-rural linkages and delves little further into marketing issues beyond this broad accusation: the rural perception recorded needs further exploration and analysis.

In cases examined in detail in Ghana, the accusations of widespread excessive control by trader associations have not been supported by detailed studies (Amanoo, 1975; Lyon et al, 1998). There is only evidence of control of certain commodities, in a small number of markets at particular times of the year. This control is reported by Brocklesby and Ega (2001) and Ejembi et al. (2000) to be based on the support of local governments as associations make tax raising easier and create opportunities for corruption. Data is required on the margins being received by traders on a daily basis. As prices vary from day to day, margins also vary considerably, especially for perishable crops. Traders therefore make their (usually modest) profits on the ‘windfall days’ (Lyon et al, 1998, Alexander and Alexander, 1991). Measuring margins requires detailed analysis of daily price data. It can provide important perspectives on the working of urban markets.

Key questions on control of market space

- To what extent and in what ways is access to market space controlled in the case study markets?
- What are the consequences for individual trader and producer-trader types?
- Who is currently excluded and with what consequences?
- To what extent does central and local government currently regulate access to market space? With what consequences?

4.2 Access to information on prices and supplies

Producers and traders require a range of different types of marketing information (Shepherd, 1997). In addition to prices and supplies, information is required on alternative channels, quality, means of payment and financing. Due to their location and lack of networks, farmers may have less access to such information. Traders may be in a better position and studies in Benue State, Nigeria, found that prices in markets were reasonably integrated (NRI, 1995, quoted in Brocklesby and Ega, 2001). However, Gabre-Madhin (2001) estimated that the opportunity cost of labour time spent searching for a trading partner and the opportunity cost of holding capital fixed during that search, represented one-fifth of all marketing costs for Ethiopian grain traders.

Of key importance are traders' personal networks that are used to obtain marketing information and access to credit from other traders. Access to information is likely to be different for different types of producers depending on the size of production, distance from markets and their own networks. Ayodele Ariyo et al. (2001) found in their study of urban and rural-based grain traders traders in the Kano region (all Hausa men) that the 30 rural traders relied more on farmers than any other information source, whereas their urban sample (30 traders again) also obtained information from other traders. Radio and government bulletins were information sources for very few of the traders they interviewed, though reasons why these are not utilised are not indicated in the study.

The importance of personalised links has been observed in several studies, most notably the detailed studies of Trager (1981a), and are reported throughout West Africa (Lyon, 2000a; Holtzman et al, 1988). From a rural livelihoods approach it is important to note who is included or excluded from networks, and how inclusion is shaped by factors such as gender, ethnicity, wealth and age. Thus, even where price information is available, the poorest group of traders may still sell in a less profitable but more accessible market, due to poor transport availability. Cultural constraints on mobility may also limit women's ability to take advantage of information about more profitable markets (Porter, 1995, re north-east Nigeria). We have little comparable information for Zambian conditions but hypothesise that many of the features of West African urban market systems will be evident to a greater or lesser degree in Zambia.

Traders' associations are also a potential forum for sharing market information and their role in this respect has been observed in some detail in West Africa (Smith and Luttrell 1994 in Nigeria; Lyon 2003 in Ghana). Specialist brokers of information on other parties are reported amongst grain traders in Ethiopia and these individuals significantly increase the total economic welfare by enabling a more efficient allocation of search effort by traders (Gabre-Madhin 2001). As noted above, in Zambia, such food trader associations are lacking (le Clus and Mwale 2004).

As Galtier and Egg (1998) point out, in a Malian context, farmers need information on such matters as wholesalers demand, storage techniques for grain and forecasts of price levels at bridge gap periods; unfortunately, for a wide variety of reasons, which they review, attempts to provide market information services have not been successful. A subsequent review by Dembele et al (2000) is more positive about the successes of the Malian Cereal Market Information System (created in 1989) and suggests that marketing margins have been reduced along major trading routes as a result of improved access to market information and increased competition, though price volatility remained a 'serious challenge' (p.2). USAID-financed solar powered radio-modems have contributed to the success achieved by allowing provision of up-to-date market information to remote areas, particularly to local radio stations. The system of data generation and diffusion is now decentralised, and linked to the Malian Chambers of Agriculture, which has cut costs substantially.

The use of the parastatals to collect and disseminate information is suggested by Dittoh (1994) with regard to his study of Nigerian vegetable marketing. There is a strong argument for governments to be involved in supplying information as the private sector rarely finds it cost effective to provide information. In Zambia, there is an Agricultural Marketing Information Centre, which was established by MAFF in 1993 (Mwanaumo 1999) and established a weekly Market Bulletin and then a monthly Provincial Market Bulletin to report wholesale and retail prices of staple grains, tubers, vegetables and agricultural inputs. However, as both Mwanaumo (1999) and Nijhoff et al. (2003) note, existing commitment to the centre is weak and production of data is sporadic. Ministry staff assigned to the centre are frequently transferred elsewhere after training and thus extra donor resources are required to keep the centre functioning.

The major recent contribution to the Zambian literature on marketing information is Chomba et al (2002), already mentioned in Section 3 in relation to information on the mechanics of food marketing. This is fairly comprehensive on what current users feel the Ministry of Agriculture and Cooperatives should provide in way of marketing information. The survey covered both large-scale and small-scale producers and traders and agro-processors. The small farmers were clear about their needs which were knowledge about prevailing market prices to enable them to make the right decisions when choosing what to grow and information on transportation costs to various main markets (mainly to enable them to negotiate with traders). Very few localised (i.e. non-mobile) traders felt that MACO had anything to offer them; and most traders knew little about the service it did provide. The information the mobile traders said they would like to have was entirely predictable: supply and demand information; transport costs; external prices and exchange rates etc.

However, a review by Shepherd (1997) of marketing information systems from 53 other countries have found that there were major limitations of public sector managed marketing information systems. Difficulties in ensuring quality come about because prices move rapidly from day to day and within the day (especially for perishable crops), producers may not understand the differences between urban and farm gate prices, and prices vary according to the grades of produce (Galtier and Egg, 1998; Lyon et al, 1998; Poole et al, 1999; Shepherd, 1997). Low quality information can be a greater threat to farmers' livelihoods than no information.

Further constraints to public sector marketing information systems include the difficulty of actually collecting prices from traders. Difficulties arise because of lack of resources and motivation, the time of day the price collectors are willing to work, the suspicion of traders and the need to find the price by bargaining. The process of bargaining involved negotiating over the price, quality and amount given as gifts to customers (Lyon et al, 1998).

Radio broadcasts of prices have often not had the expected impact in Ghana (Lyon, 2000b) as farmers do not trust the quality of the information and it is out of date by the time it is broadcast. Even if prices are correct at time of broadcast, by the time remote farmers have reached market they are likely to have changed. Moreover, there are likely to be gendered patterns of access to radio information (Chapman et al, 2003). Asante et al. (1997) noted that (mostly male) farmers in central Ghana do use radio price reports but in a study in coastal Ghana few women farmer-traders were found to have access to a working radio (Porter 1999). The lack of trust in government bodies is another major obstacle. This can be overcome through encouraging local independent community radio, although this may require changes in existing legislation (Chapman et al, 2003).

In Zambia the recent marketing information survey makes clear that both small scale farmers and traders believe that radio is a very efficient way of disseminating information, but they are keen that the programmes should be in the evening when they have time to listen (Chomba et al 2002). The ZAMTIE report on the maize market also recommends that price information should be disseminated by radio (le Clus and Mwale 2004). It further suggests that various different estimations of maize supply (eg FAO and MACO) need to be reconciled to improve the quality of market signals and points to a 2004 study by FEWSNET (Famine Early Warning System Network) which has been disseminated widely, and apparently contains sound recommendations in this respect.

The large-scale producers in Zambia, who are very important for an array of food commodities (although not maize), are apparently already well served by their own organizations and direct links with buyers. The difference between their mode of production and the smallholders is illustrated by their preference for information via email or fax and their particular interest in international information (e.g. Argentinian prices). However, a recent World Bank report (2003) distinguishes between the dozen or so large corporate organisations in Zambia and the 600 or so large-scale commercial farms and suggests that constraints faced by the latter include weak market information.

The use of telephones can benefit all parts of the marketing chain although the difficulty of having land lines to rural areas has been prohibitive to date. However, mobile telephones have already massively changed the landscape of communication for the middle classes in many African cities and in countries like Bangladesh are now also a vital means of communication for many rural dwellers. The Grameen Bank's Grameen Telecom was set up in 1996 to provide cellular mobile phone services to 100 million occupants of 68,000 villages by providing micro-financed phones on credit to village women (James 2000). By 2002 the Village Phones programme had 9,400 phones across Bangladesh (mostly one per village) (Hawkey 2002).

The phonestop and telecentre concepts could well be set to transform market information systems in Africa over the next decade (Rathgeber and Adera 2000). A recent review of the Nigerian economy suggests that ‘the biggest change has been the private-sector revolution in GSM mobile telephones’ (Financial Times, Nigeria survey, June 10, 2003,p.1). It had reached 1 million subscribers by February 2003 (ibid. p. 3). The challenge will be to ensure that such systems are able to provide benefits to the urban and rural poor, not simply the middle classes. The fact that the GSM network in Nigeria is already serving roadside mobile booths looks very positive. Nonetheless, there may be gender implications which need consideration in policy formulation since evidence to date suggests women often have more difficulty gaining access to telecommunication benefits (Graham 1998, Schreiner 1999).

Devereux (2001:230) suggests that donor support in the price information arena could be much more effective if they committed themselves not merely to providing funding, software and technical assistance, but also by making ‘explicit long-term commitment to the development and *institutionalisation* of information systems, including providing training in information technology and the new methodologies for monitoring food insecurity’.

Key questions on market information

- What are the principal channels of information currently used by traders of different types in case study centres?
- How important are personal networks for information gathering?
- Are there specific information brokers? If so, how do they operate?
- How much use is made of government information outlets?
- What are trader perceptions of government information channels?
- If these were improved would they be used more? If so, how could they be improved?
- To what extent are mobile telephones used along different components of the marketing chain? What are the barriers? What is the future potential?

4.3 Traders’ access to finance

The problem of access to credit and high cost of credit for farmers and small-scale traders has been widely reported across West Africa over many decades (Vigo, 1965). There is research in Nigeria which suggests that, in a marketing context, many potential borrowers will fall between two stones: too large for informal lenders and too small for the formal lenders (Nissanke and Aryeetey, 1998). This is a common problem among small and medium enterprises which needs further investigation in a marketing context. A USAID study (2001:13) notes that Nigerian banks have not developed the marketing, appraisal or supervision capacity that would allow them to lend to small clients. Moreover, the problem with small business lending is not physical absence of collateral, but its official invisibility (i.e. legal absence) associated with lack of property registration (itself caused by the complexity and high cost of registration procedures) (ibid. 14). Interest in the informal credit market for SMEs reportedly reaches 100% or even more, but has the advantages of greater flexibility in loan terms, needs little if any documentation, and has low transaction costs for the entrepreneur (ibid:15). The Community Banks first established in Nigeria in 1990

have expanded bank density: although private enterprises they have a government image which reportedly affects loan recovery.

Micro-credit programmes are growing in number in Nigeria. The EU's MPP3 programme in Rivers and Bayelsa states (reviewed by Development Associates, 2003) is, unusually, targeted at women, but food traders - many of whom are women - are often considered too risky by such programmes. There appears to be growing scepticism about the capacity of these NGO micro-finance projects and there have been recent calls for the formal financial sector (banks, credit unions and finance companies) to play a greater role in providing financial services to the rural poor (Havers, 2001; Gamser, 2001). In Ghana, where rural banks were set up specifically to aid farmers in the mid-70s, there have been some positive examples of assistance to small traders (Nikoi, 1996, provides an interesting case of a scheme which helped women traders with transport) but most banks have unfortunately increasingly focussed on the safer option of lending to salaried workers (Nikoi, 1996; Porter, 2002). Whether the Nigerian banking sector is more capable of developing effective rural credit and savings programmes if given support is open to question and probably needs further research. USAID (2001:22) reports several Nigerian credit unions developing relationships with private women's savings clubs which collect from their members on a daily basis and see the credit unions as a safe repository for the savings. These arrangements may allow women to establish a successful repayment history through participating in solidarity loans from the credit union. The USAID report (ibid: 23) suggests that if the credit unions could be strengthened through consolidation and economic integration, they could become more efficient and thus more profitable than most are currently. They are reported to need updated accounting systems, and stronger controls, policies and procedures.

Work by Ayodele Ariyo et al (2001) in the Kano metropolitan area suggests that, as might be expected, rural grain traders have less access to diverse sources of capital - notably institutional or formal loans from the Government, Banks and private companies - to expand their activities than their urban counterparts. According to an NRI/Bayero University survey of 1996, urban and peri-urban horticulturalists government round Kano in the 1990s could only obtain government sponsored credit if they belonged to a farmers association and this policy had excluded at least 90% of the farmers they surveyed (Orchard et al. 1998, Olofin et al 1998). This has been a widespread reason for farmers forming groups in Ghana: they commonly exist only until the credit has been disbursed (Porter and Lyon 2003.)

The difficulties for women in obtaining formal credit are particularly pertinent in the trading sector in West Africa. These difficulties are linked to their low social status and lack of collateral. Grieco et al. (1996:33) note that lack of access to capital among women traders in Ghana has consequences for the size of load generally transported and the frequency of trips made (a point not commonly recognised in the marketing and transport literature.) For many - particularly women - the only solution has been to rely on informal savings and credit associations, notably ROSCAs (Ardener and Burman eds, 1995) and other cooperative or informal savings mechanisms for obtaining business finance. However, there are often problems associated with defaulting collectors. In Ghana, Aryeetey and Aryeetey (1996) and Jones et al (1997) observe a lack of faith in susu, especially in rural periodic markets. As a consequence of defaults susu associations now barely operate in some villages.

A programme to strengthen the capacity of susu collectors by providing training has been introduced in Ghana under the auspices of the Micro-Finance Institutions Action Research Network (TechnoServe newsletter, February 1998). Informal financing systems such as credit from suppliers, money lenders or rotating credit systems, can be important (see Eboh's study in south-eastern Nigeria) but may be very expensive. Evidence of this was reported on the Jos Plateau where trader credit was particularly significant as a component of urban trader/farmer interactions though also evident, to a rather lesser extent, in rural trader/farmer interactions (Porter 2001c). This is also reportedly the case in the Kano metropolitan region (Ayodele Ariyo et al. 2001) in Southern Nigeria (Trager 1981a) and in several studies in Ghana (Lyon, 2000a; Clark, 1994). This source of financing is vital to keep trade moving although it can be used exploitatively if individuals become tied into debt relations over many years (Watts 1987; Clough 1981, 1985; Bhaduri 1986). Fafchamps (2001) notes that in Benin and Malawi advances by traders to farmers were of short duration, often only one to two weeks, and were given principally in order to secure future deliveries, not to exploit farmers' need for cash to finance agricultural production.

There appears to be much less published material specifically on the credit issue in Zambia than Nigeria, though government intervention in credit markets (as in other areas of the Zambian agriculture and food marketing sector) is strongly in evidence. Jayne et al. (2003) report government selection of local agents to receive donor programme fertilizer on credit 'according to procedures that consistently lack transparency' (p. 298) and focused on political patronage objectives. Agents were supposed to provide 'resource poor' farmers on credit and recover these loans at the end of the season through maize purchases. Apparently the so-called agents were 'local elites or their proxies' and the loan default rate was extremely high. The general agricultural policy literature for Zambia does make clear that fertiliser or other inputs were given on 'credit' pre-liberalization but that the political economy of this transfer was such that recipients did not expect to 'repay'. There is a slippage therefore between discussion of subsidies and credit in some of the literature.

A strong criticism of the Chiluba government in the later 1990s was a tendency to intervene in the fertiliser market, in particular, for some smallholders in a rather similar way, i.e. without cost recovery. There is a strong tension in the literature between the view that this prevented private traders operating properly in the fertiliser market (e.g. Farrington and Saasa 2002; Jayne et al. 1999) and the view, based on empirical evidence of falling access to inputs and maize output across the country, that this was a necessary, if unfortunate, intervention to ameliorate smallholder food insecurity. According to Copestake (1998), the intervention made a significant transitory contribution to rural social security in the aftermath of severe drought. Without this continued government-sponsored credit, he argues, there would have been a sharp fall in availability of fertiliser among smallholder farmers after 1994, and maize production would have been significantly lower.

Although the official documentation on the Agricultural Commercialization Programme (ACP) notes that localised micro-finance systems along the ROSCA model have occurred, the policy document concludes that no successful agricultural finance model has emerged yet to serve Zambian smallholders (Republic of Zambia 2001: 31). This clearly remains a major policy issue in that country. Farrington and Saasa (2002) note that fertiliser supply (for which one can also read 'credit') remains

the most confusing issue in agricultural privatization in Zambia. The one exception is the provision of credit to out-grower schemes in products like tobacco, cotton and flowers, which have thrived along the line-of-rail in the 1990s, with 10,000 involved in horticultural schemes alone by 2002 (Farrington and Saasa 2002). However evidently these are not relevant to the domestic food market. In 2000, 82% of the 118,000 agricultural households who received formal loans did so through out-grower arrangements (CSO 2000, cited in Giovanucci 2001).

There are also clearly major problems with bringing the large banks into the rural credit picture in Zambia. One of three components of the six-year Economic Expansion in Outlying Areas (EEOA) programme was a Credit Guarantee Fund which hoped to facilitate this. However the completion report on the programme reported that, despite strenuous efforts on the part of EEOA officials, this initiative had to be abandoned. The main problems were that the banks were simply not interested in providing credit to small-scale entrepreneurs in rural areas and were not prepared to carry the risk involved, even though the programme would have carried a significant proportion of the risk. In the end the EEOA shifted their focus to various small-scale rural savings schemes, along the ROSCA model, and a micro-finance initiative which, after a shaky start, appeared to be on a sounder footing by 2002 (RWA 2003).

In the Nigerian and Zambian contexts we need to examine current patterns of credit provision to urban and rural producers and marketers where this is needed, and explore the potential for extending and improving that provision. Dorward et al. (2003:325) observe that there is an inherent contradiction in donor's strong emphasis on competitive markets and simultaneous calls for support for bottom-up non-market organisations including micro-finance groups which are not part of a competitive market structure. They argue that there is a need for policy analysis to catch up with praxis and integrate these alternative institutional arrangements into an overall conceptual framework. This may be a particular imperative in the low density economic activity context of Zambia.

Key questions on credit provision

- What credit provision is available to key trader types along the urban food supply chain?
- What proportion at each level comes from formal as opposed to informal sources?
- What interest rates are applied?
- To what extent have microfinance schemes assisted in credit provision among the various trader groups?
- Can credit provision be improved? How?

4.4 Access to transport and lorry parks

Access to transport depends on the availability of appropriate vehicles at the right time and place, access to fuel in the case of motorised vehicles, the existence of suitable road infrastructure and the ability to load and unload in key urban areas.

The expansion of the *paved road network* commonly plays a major role in encouraging food production because of its impact on all-season market access to

major urban centres. In both Nigeria (Porter 1997) and Zambia (Jennings 2001; Oygard et al. 2003:21; Pinder and Wood 2003:) the deficiencies in the paved network (along with shortage of high quality gravel roads) in rural areas is a major constraint on urban food supply from remoter rural locations. In some areas in both countries, it may be the most significant constraint for both traders and producers being able to profit from food marketing, with consequent massive implications for income distribution and efforts at poverty alleviation (The IDL group 2002; Christiansen et al. 2003).

Nigeria's inter-urban paved road system was massively expanded during the oil boom in the 1970s, but failure to maintain roads subsequently has led to severe deterioration in recent years (Porter 1996). In a survey of 36 rural and urban communities across Nigeria in 1995, infrastructure issues (roads plus water supply and health) dominated as a development priority in all locations (Francis et al. 1996). It is estimated that post-harvest food losses in Nigeria amount to 20-25% of total output (Ali-Akpajiak and Pyke 2003:14), of which a substantial portion must be attributable to transport failure. Recent studies in individual regions of Nigeria, commissioned by the Ministry of Agriculture and Rural Development, illustrate the scale of current rural access problems and the linkages between poor road access and poverty (Imaga et al. 2000 for Enugu State; Unilag Consult 2001 for the Niger Delta; Transport Studies Unit 2001 for South West Nigeria; Uza et al. 2001 for Benue State; another study – Olawoye 2002 - focuses on gender issues),

The scale of the problem is arguably even greater in Zambia. Access to good roads is always one of, and frequently *the*, major cited constraint on crop marketing in Zambia in recent official reports and major surveys of agriculture (e.g. Republic of Zambia 2001: 14; Copestake 1998; Jayne et al 1999) although oddly it is not considered at all in a recent DFID-commissioned document on 'Drivers for Change in Zambian Agriculture' (Farrington and Saasa 2002)). Seshamani (1999) states, for example,

Firstly, there are not many private traders in Zambia and most of those that are there are concentrated in main city centres such as Lusaka. Secondly, these would not have sufficient motivation to go and collect grain from remote rural areas especially because of the completely run down rural road network.

Recent reports on allAfrica.com illustrate the ongoing concern about Zambia's road access problems: one report (Feb 4th 2004) for example notes that in Eastern Province farmers sell their produce in neighbouring Malawi because poor roads prevent them accessing local Zambian markets. Malawi has reportedly built markets along the border to encourage this trade.

The transport/accessibility to market issue seems to be driving new approaches to the agricultural sector in Zambia in the post-liberalised era. The World Bank's ROADSIP programme (1997-2002) strategy has been to commercialise road management, but the Bank recognises that 'insufficient appreciation for Zambia's transport constraints as a landlocked country has resulted in inadequate attention to transport policy dialogue, intermodal issues and sector work' (World Bank 2002: 63) The International Fund for Agricultural Development (1999) recommended a geographically focussed loan for a smallholder enterprise and marketing programme

(SHEMP). This would concentrate on areas with a) a concentration of trading/processing and economic activity; b) concentration of smallholders producing or with potential to produce marketable surpluses c) accessibility. Inevitably this restricted the area to be covered to along the line-of-rail, and also parts of Eastern Province along the road to Chipata on the Malawian border. This is argued to cover over half of poor households. On the other hand it also means that about half of Zambia's rural households, who are least well served by current marketing arrangements, will thereby be left out. Another major donor initiative, the SIDA-funded Economic Expansion in Outlying Areas (EEOA) programme, was designed to support small-scale farmers in outlying areas, i.e. selected districts in Northern and Eastern Provinces. This ended in 2002 and is reported to have been quite effective (RWA 2003). It is considered further below in the section on 'Other External Actors' As already alluded to in the Zambian profile section, the ACP (the current Zambian government agricultural programme) may implicitly have accepted the commercial logic of the IFAD approach. With respect to the distance/transport issue it also states that 'long distances to major domestic and international markets limit the potential for large expansion of staple food production in most parts of the country' (Republic of Zambia 2001:28).

The nature of the institutional problems in the road sector in Zambia which impinge on the IFAD-supported SHEMP, including inter-ministry rivalry, are discussed in Jennings (2001); subsequent institutional changes are indicated in Clifton (2003). Their potential developmental impact will need examination.

The high cost of paved road construction tends to limit this intervention to central government, in Africa as elsewhere. Decisions regarding which roads to pave may often be more dependent upon political factors than agricultural or other economic potential along the proposed route (Porter 1995, 1997, 2002 etc.; Ayodeley Ariyo et al. 2001). However, recent work on community road prioritisation in Ghana by IT Transport suggests a more interactive and productive approach to road improvement between government, business and communities can be achieved, with potentially significant benefits for both (rural and peri-urban) farmers and urban traders and consumers.

Recent work in Nigeria (Meagher 1999, Porter 2002) suggests that community road work has been crucial in some regions to maintaining access over the 1990s. This may be an important point to bear in mind when considering road interventions for improved market access. Access to markets is often constrained by the high costs of moving produce from farms to road heads and local markets. Provision of feeder roads can therefore have a large impact on the rural poor, especially in remoter communities. A recent Federal Government report on rural development sector strategy (October 2001) suggests that rehabilitation and maintenance of feeder roads established in the late 80s and early 90s by the now-defunct DFFRI should involve the promotion of established community-based road maintenance groups using road maintenance equipment provided by FDRD.

In Zambia where lack of road maintenance is a major problem due to a mix of institutional and financial constraints (Republic of Zambia 2002:8), the ACP has also suggested a move towards a form of community-based road improvement. The suggestion is that since *subsistence* farmers cannot afford to obtain credit and/or

modern fertiliser or seed inputs as, by definition, they do not make any sales to generate cash, and because most farmers are *subsistence* producers of maize, that 'farmers should either purchase inputs or obtain inputs through inputs for work on rural roads. This would eliminate the need for repayment and totally do away with expensive private firms usually hired to chase small amounts of money. Since all major feeder roads need to be repaired every year, inputs for work is a reliable source of inputs' (Republic of Zambia 2001:28). The proportion of mainly subsistence farmers has greatly increased since liberalisation. Whether this suggested policy has actually been implemented and whether it can serve to facilitate the re-entry of some smallholders to the market is an important research question.

Malmberg-Calvo (1998) emphasises the need to develop an institutional framework for managing and financing the lowest level of the road/path network and this probably has much relevance to the Nigerian context. She stresses stakeholder involvement and the need for a redefined public-private partnership, whereby local governments or their agents manage the core roads and communities and farmers' associations choose which roads to 'own' and take responsibility for. Defining ownership is likely to be crucial as a precursor to new initiatives in road and path improvement in both Nigeria and Zambia, though the process may well be time-consuming.

In Zambia the rail system is also an important component in food evacuation. Efforts to build small farmer coalitions for example tend to be focused along the line-of-rail (Pletcher 2000). Nijhoff et al. (2003: 19) thus suggest public sector help is needed with rehabilitation of the railway system and integration of its operations with South Africa and Tanzania.

So far as *transport services* are concerned, there is evidence from Nigeria and elsewhere in West Africa, that a conducive policy environment and the availability of credit can do much to encourage uptake and development of both motorised transport services and intermediate means of transport in the private sector (Barwell 1996). According to one survey, car ownership in Nigeria's urban areas has reached 14.9% of the total population, compared to only 4.5% in rural areas (Nigeria Demographic and Health Survey 1999, cited in World Bank 2002). The percentage of working vehicles may, however, be much lower and there is ample evidence of the severity of transport access problems in rural Nigeria in the recently commissioned rural transport studies cited above (Imaga et al. 2000 for Enugu State, Unilag Consult 2001 for the Niger Delta, Transport Studies Unit 2001 for South West Nigeria, Uza et al. 2001 for Benue State; Olawoye 2002).

In Zambia access to transport services seems even more problematic than Nigeria. In rural areas formal markets are few in number and tend to be located only at district centres. In the low-population density areas of eastern and northern provinces, distances to market centres reportedly average 40 kms. However, independent transport is hard to come by since large companies dominate agricultural marketing and send their own trucks to collect produce. Ellis and Hine (cited in Starkey et al. 2002:43) observe that this takes away work from local transporters and contributes to a vicious circle of low demand, and infrequent but expensive transport services. Nijhoff et al (2003: 19-20) thus observe the need for public sector support to transport

in smallholder areas in Zambia in the form of help with access to imported spare parts and capital equipment.

There is growing interest among donors in the potential of Intermediate Means of Transport (IMT) for assisting small producers with their marketing and associated activities in sub-Saharan Africa (Barwell 1996, Starkey et al. 2001, White et al. 2000). In Nigeria (where IMT development and promotion was proposed in the 2001 Rural Development Sector Strategy, pp. 35-36) this has led to preliminary work on IMT potential, notably in the Ekiti rural access project (IT Transport 2001). The rapid spontaneous expansion of motorcycle ownership and motorbike taxi services in some areas of Nigeria (Guyer 1997, Yunusa 1999, Fasakin 2001, Porter 2001) suggests considerable potential for further development in this field. Recent statistics suggest that 9.8% of urban and 30.5% of rural people in Nigeria own a bicycle, and 13.9% of urban people and 13.3% of rural people a motorcycle (Nigeria Demographic and Health Survey 1999, cited in World Bank 2002:36).

In Zambia an IMT project was established in 1999 with financial assistance from the World Bank. Pilot projects have started in selected districts (Jere 2003). The RTTP programme aims to promote awareness of IMTs through demonstration, including among women (RoZ Ministry of Local Government and Housing 2002). Since women tend to be side-tracked in IMT projects, (though they usually perform much of the portage of agricultural produce) this is an important aspect of the project. However, cultural constraints such as the negative attitude to women driving ox carts may be significant in Zambia (RoZ/University of Zambia, n.d.) A RoZ report (2002:11) also notes other constraints on IMT uptake, including the fact that taxation on IMTs is very high and the overall political and institutional environment not conducive to adoption. This document suggests the project is at a very early stage in which rural transport demand is still being assessed. The concept of 'critical mass' is particularly important in IMT uptake (Starkey et al. 2001, Porter 2001): whether this will be considered adequately in the Zambia pilot projects remains to be seen.

Porter (1995, 1997, 2002, 2003) emphasises transport service issues in Nigeria, and elsewhere in sub-Saharan Africa, the particular marketing problems faced by producers resident in off-road areas and the impact of road construction on off-road areas with specific reference to women traders, noting variations in impact related to cultural factors.

Access to fuel can be a crucial factor in moving produce – especially perishable produce- to market. Ironically, in oil-rich Nigeria, petroleum shortages remain a major issue for food producers both in northern areas including the Jos Plateau (Porter 2001) and south-eastern Nigeria (Braun et al. 1998). The issue of breaking supplier cartels has not been adequately addressed and is clearly a highly sensitive political issue. Nonetheless, fuel price regulation has been the 'first symbolic plank' in the government's reform platform but the impact of a 55% increase in the official fuel price (to bring it roughly to the black market level- subsequently reduced to 30% because of strike action) on transport and food costs has been substantial (D. White: Fuel price rises first plank of reform programme, Financial Times 24/02/04).

In Zambia the issue seems to be simply one of fuel price. Nijhoff et al (2003: 19) suggest that the transportation sector needs support through reducing taxes on fuel:

taxation in 2002 accounted for approximately 70% of the pump price (Farrington and Saasa 2002:vi). On the other hand, this is a double-edged sword in a country where tax revenues must, perforce, be largely indirect except for corporation taxes. Indirect taxation of consumption has major advantages - it is arguably fairer than most other forms of taxation - and in a non-oil producing, landlocked state, fuel conservation is an important issue.

Another issue is the role of transport unions, which can restrict the development of efficient and inexpensive transport services, as Fouracre et al. (1994) illustrates with reference to the GPRTU in Ghana, and struggles around control of lorry parks which have been exacerbated in Nigeria by the expansion of youth gangs (Gore and Pratten 2002, see below). Other constraints are experienced during travel along the road: roadside inspections by numerous administrative bodies are often a major cause of delays and charges (Swegle ed.1994: 149).

Key transport questions

- How is the existing transport system organised to bring food supplies to urban case study centres?
- Who else may be able to provide transport but is not allowed access at present?
- What are the regulations and institutions (formal and informal) regulating access to fuel?
- What are the regulations and institutions (formal and informal) regulating access to routes and lorry parks?

5. CONSUMPTION AND URBAN FOOD SECURITY

5.1 Impact of food systems on consumers

The impact of regulation and institutions in food systems on consumers is highly varied. In urban areas there is a diverse range of consumption behaviours shaped by ethnicity, household structure, and poverty. Research into urban food security rarely examines how different groups of consumers are affected differently (Atkinson 1992, Van Liere et al. 2001). There is substantial danger in urban nutrition studies of drawing false inferences about the entire urban population from samples drawn from subpopulations with particular characteristics (Atkinson 1992, Ellis and Sumberg 1998). Attention also needs to be given to differences in food security within households and the roles of men and women in buying different types of food.

Household structure can shift dramatically as people move from rural to urban areas. Dia (1997) notes that definitions of the household have to take into consideration the extent to which households are consumption units, production units or simply co-residents. Atkinson (1992) shows how, with urbanisation, there is a tendency towards a shift to independent production, income generation and savings which in turn affects consumption habits. At the same time there can be a trend towards larger households or 'poly-nuclearisation' with young couples staying with relatives or their siblings, and with permanent guests who may eat outside the household (Dia 1997).

The extent of poverty shapes both eating habits and shopping behaviour. Wealthier consumers are more likely to eat processed food, buy in supermarkets or restaurants, and eat a higher proportion of meat, fish and oil (Dia 1997). Food insecurity is therefore an issue of affordability rather than actual quantities available in urban areas and poorer consumers will spend a large proportion of their income on food (Maxwell 1998). As Ellis and Sumberg (1998) emphasise, a rise in urban agricultural production is no guarantee that the nutritional needs of those in the city most vulnerable to food insecurity are better met.

An extremely important issue around urban consumption is the sheer deficiency of urban diets in relation to nutritional needs and the impact of this on urban people's health. The shocking rise in Zambian child mortality rates in rural and urban areas from the 1980s to 2000 must be attributed largely to people's increasing poverty (e.g. McCulloch et al. 2000, Potts 1997, 2004). The acute problems faced by Zambia's urban youth, for example, have specifically been addressed by Mulenga (1999) for the Copperbelt and Schlyter (1999) for Lusaka.

A general mismatch between many formal sector incomes and necessary food purchases for urban households has been recorded throughout sub-Saharan Africa in the 1980s and 1990s (Weeks 1993, Potts 1997, 2004). In Malawi, Chilowa and Roe (1990) found that the proportion of urban household budgets spent on food in Blantyre and Lilongwe soared in the 1980s as structural adjustment was implemented. By 1988 the share was 63%, compared to only around 25% in 1980.

Important urban budget research by the Jesuit Centre for Theological Reflection (JCTR 2002) in Lusaka provides vital data on the amount of money needed to feed a family of six healthily to illustrate this issue. The monthly 'take home pay' of a selection of *formal* sector workers (teachers, nurses etc) could not cover this cost.

However, the JCTR's budget only relates to those in the urban formal sector while the majority of the urban population works in the informal sector where incomes will generally be even lower. These data provide the essential context for the child mortality statistics. It also provides an important counterpoint to the view, that the government's continued efforts to prevent sudden rises in the price of maize are unwarranted. The depth of contemporary urban poverty in Zambia is never considered in this literature.

These data are reflective of what Jamal and Weeks (1983), in their important book, *Africa Misunderstood: whatever happened to the rural-urban gap?*, call the 'urban wages puzzle'. They found a host of adaptations by the urban poor, including much recourse to informal sector work by women and children and many changes in rural-urban linkages (Jamal and Weeks 1983, Potts 1997). The HIV/AIDS pandemic which, it is important to note, did not contribute to the rising child death rates in the 1980s which saw the steepest rises, but may have played a part in the 1990s, has added to the key significance of improving the nutritional balance and adequacy of urban diets.

Nigeria's changing economic circumstances from the 1980s also led to formal incomes suffering huge declines relative to basic food costs. Peil (1991, cited in Potts, 1997) showed how low incomes were inadequate for food security. In 1996 it was estimated that 66% of Nigeria's people lived on under \$1 per day; a review in 2002 suggested that the figure was now between 50 and 70% (World Bank 2002). The limitations of statistical data collection in Nigeria make it extremely difficult to gauge the exact size of the poverty problem. However, food price data for southern cities for 2000/2001 presented in *Africa Confidential* (June 4-17 2001: 8) suggested that food prices were increasing rapidly at that time, such that: 'for the first time in Nigeria's history, garri now costs more than rice, the elite food of the past'.

An affordability issue for poorer consumers in both countries, whether purchasing raw or processed foods, is that they usually cannot afford to buy in bulk and thus commonly have to buy daily from local retailers. Purchasing in small quantities in this way raises its cost. Maxwell et al (2000) found food purchases in Accra came to over half their total expenditure. One third of the total household budget was spent on street foods. Levin et al (1999), also working in Accra, similarly concluded from a household survey that food is the single most important item in the family budget for all households, whether male- or female-headed.

Levin et al.'s household study in Accra (1999) raises a number of important related issues on urban consumption. In particular, they note that despite lower incomes and additional demands on their time as housewives and mothers, female headed households, petty traders and street food vendors had the largest percentage of food-secure households. However, female-headed households spent proportionately more income on food and consumed more of the cheap bulky staple foods than their male-headed counterparts. So although female headed households had adequate calorific availability levels, they were more vulnerable to shocks, because 'they expend a higher proportion of their disposable income to acquire the calories' (p. 1986). They also observe that low-income self-employed women who work as petty traders and street food vendors are often the target of crackdowns by municipal authorities. This will substantially increase their vulnerability. Levin et al suggest a series of policy measures, including the need to strengthen the capacity of nascent associations of

traders and street food vendors and to help develop self-regulatory mechanisms on problems of informal trade activities, arguing that such local associations would be good for business and for public health and safety. However, they recognise this would need the municipal authorities to change their approach. This study suggests a number of avenues worthy of exploration in Nigerian and Zambian contexts.

Purchases in very small quantities can bring extra time pressures, particularly if people have multiple income generating activities as a way of coping with poverty. This probably partially explains the popularity of street and convenience foods such as bread among poorer urban income groups (Kennedy 2003 cites literature from Tanzania, Cameroon and Ghana to support this view). Oguntona and Tella (1999) found from a survey of 197 Nigerian market women that street foods constituted their major dietary energy and nutrient source. However Adubi (1996:6) refers to studies in Abeokuta and Warri in southern Nigeria which suggest that many city residents in that region rarely eat food prepared outside the home (59% and 87.5% of households respectively rarely eating food prepared outside). He suggests that food prepared outside has become very expensive in Warri and Lagos and implies that this forces consumers to limit their purchases by taking food prepared from home or restricting consumption during the period they are away from home (ibid:6). In areas like urban Hausaland, where there is a long tradition of eating street food and a substantial range of indigenous snacks prepared by secluded women, such a trend is unlikely but nonetheless the pattern and trend of street consumption needs investigation.

The opportunity costs of time spent cooking can be high in a pressurised urban environment. The growth of street/convenience food sales may offer expanded opportunities to urban women food processors and hawkers but raises questions about the impact of poor hygiene in street food outlets given the widespread inadequacy of current regulation and institutional and physical infrastructure (notably street vendors access to water).

Concern about the inadequate nutritional value of the diets of the urban poor in sub-Saharan Africa, notably the failure to eat sufficient fruit and vegetables, is another sporadic but increasingly regular feature in national newspapers. The extent to which the expansion of urban and peri-urban horticultural production and improved marketing of that produce can address this concern is unclear. There are also potential health dangers associated with vegetable consumption, especially when vegetables are produced in urban areas (heavy metals, use of sewage compost etc., see Midmore and Jansen 2003).

It is also important to note that the location of markets and distribution systems can affect poorer consumers differentially, especially if they are living far from central markets and have to rely on secondary markets where there is less choice and competition (Dia 1997). This helps explain the intervention of local governments in Lagos in the construction of so-called Corner Shops, each with 5-20 individual shops: it aims to bring food closer to the people and reduce congestion in the main markets (Adubi 1996:22). Shopping behaviour is not only shaped by the need to buy food; it is also an important social activity whereby consumers can build and strengthen their social relations and networks.

Macro-economic changes can have a rapid and very substantial impact on both eating

habits and shopping behaviour. The impact of oil price collapse in the 1980s on urban food retailing systems in northern Nigeria, for example, was to drive middle-class consumers back from the modern air conditioned supermarkets to traditional urban markets where they could purchase in smaller quantities, sometimes at lower prices and obtain credit (Porter 1990: 83). The crucial importance of availability and accessibility of food products in shaping the consumption pattern of Lagos is emphasised by Adubi (1996:v).

Overall trends, however, seem to have been towards a change in diet across much of the urban population in Nigeria, rich and poor, as foods with long preparation periods are discarded in favour of processed foods. In Zambia, by contrast, there has been a huge shift towards less processed maize meal since liberalisation because it is cheaper and available from smaller millers. In the past the central marketing board (now no longer operating) only sold to the large millers who produced highly processed meal (Jayne et al. 1999). More processed foods lead to a lengthening of the food chain and increasing prominence of a diverse range of new actors in urban food systems. Ensuring that small local producers in rural, peri-urban and urban areas are able to compete effectively with larger commercial enterprises in serving these longer and more complex chains will require substantial attention to current physical and institutional constraints. Evidence that poor producers can participate in these new supply chains is rare (though Maxwell and Slater (2003) provide encouraging case studies from India and Ghana).

Maxwell's (1997) list of empirical questions for analysis of urban food and livelihood security is worth reiterating in full at this point:

1. Have problems of *aggregate* food supply been resolved.
2. What has happened to real urban food prices and real incomes over time?
3. What has happened to formal safety nets intended to protect the poor?
4. How have people responded to drops in real income? What happened to livelihoods, household organisation and the labour of women?
5. What has been the response of national (and local governments) to changes at the household level? What happens when the livelihood and survival activities of the urban poor run into direct conflict with actions and policies developed by urban managers and national policymakers to improve infrastructure, attract investment and lay the foundation for sustainable growth at city and national economic levels?
6. Can examples be found of 'constructive reciprocities' between state-local government and civil society? Are there models of collaboration among national and municipal governments, local organisations and local communities to protect the most vulnerable?

Key questions on consumption and food security

- What are the buying patterns of different types of consumers?
- Where do poorer consumers buy their food ?
- What types of food do poorer consumers buy?
- What are the restrictions on poorer consumers in accessing lower-priced or better quality food?

5.2 Food safety issues in food marketing

Storage of food products can bring serious dangers for urban consumers. Ayodele Ariyo et al (2001) describe how, in the Kano region, traders treat their stored grains with chemicals to protect against loss. They reportedly treat the grains before storage and inspect stored grain regularly, repeating chemical treatment as necessary. Stored grains have to be sold off at a reduced profit if spoilage is great. Evidence from Ghana (Young 1998) suggests farmers commonly over-treat their stored maize, with potentially harmful effects on consumers.

Health standards and regulations are also important particularly for perishable produce, meat and fish. The Government of Nigeria launched the National Policy On Food Hygiene And Safety in 2000 with the aim of stimulating and promoting legislation concerning food production storage handling processing preservation trade transportation and marketing (Omotayo and Denloye, 2002). However, the enormity of the task without adequate resources makes satisfactory implementation unlikely in the near future. Shortcomings of food safety control in Nigeria outlined by Anyanwu and Jukes in 1991 still appear to remain largely unaddressed. The chief implementing agency, the FDAC (Federal ministry of health- food and drugs administration and control) was hampered by lack of funds, absence of analytical facilities to test products and inadequately trained inspectors. As Anyanwu and Jukes point out, moreover, there is little value in setting unattainable standards for local food traders who will be put out of business if these are stringently applied. It is more likely, indeed, that imposition of such standards will simply encourage rent seeking behaviour.

Prior to liberalisation of food markets in Africa, parastatal organisations were responsible for ensuring standards. With the move to privatisation there was an increased role of regulatory institutions to give protection to consumers and monitor any market abuse (Cook and Minogue 2003). Most countries have these enshrined in their legal system although the ability to enforce these laws is often a constraint in less developed countries (Cullinan 1997).

Key questions on food safety regulation:

- Which government regulations in place in case study locations to protect consumers currently have any real impact on food safety?
- Which regulations in place are enforced? Which are not enforced? Why not?
- How can enforcement of regulations be improved? (including trader and government perceptions)

5.3 Consumer groups and associations

Dia (1997) report a rapid growth in all types of consumer groups in 45 Francophone African countries from six in 1990 to 100 in 1997. These tend to be sector specific and led by the middle classes. Many have come about in response to concerns over the quality of imports following liberalisation and the dumping of lower quality produce from other countries. They are often modelled on European consumer groups with an emphasis on lobbying and having a Watchdog function. Poorer consumers are probably not well represented in such groups, but their publicising of specific food safety concerns may have contributed to reduce dangers across a wide spectrum of consumers, for example in cases like vegetable oil adulteration in Nigeria. Nonetheless, Maxwell (1998) suggests that urban food insecurity has shifted from the

state to the household or individual level with a resulting muffled political response. The activities of groups like the Consumer Unity and Trust society (which reportedly has a research centre in Zambia) are focussed mainly on regulation and competition but their activities in other areas, including the food safety arena, will need checking (Khan 2003).

Key questions on consumer associations:

- What consumer groups are operating in the case study locations?
- How do they operate and what do they do?
- What political representation is there for poorer consumers?
- Is there potential to increase their voice?

6. THE ROLE OF CENTRAL, REGIONAL AND LOCAL GOVERNMENT IN MARKET REGULATION AND FACILITATION

Tension and mistrust between the public and private sector in the produce marketing field has been a characteristic feature across Africa. Nonetheless it is important to examine ways in which the public sector can support private initiative, while bearing in mind the historical context of frequent antagonisms between the two.

Government intervention in food markets in general has been much more prominent in the Zambian context than in Nigeria, historically. In Zambia until the late 1980s, the maize market in particular was largely government controlled through marketing boards, government set pricing, trade restrictions and import subsidies. Some market liberalisation occurred in the 1990s, but was incomplete especially in the case of maize. In recent years the government has still sold some imported maize to some of the big millers at below market prices, disadvantaging small scale traders and millers (Oygard et al 2003:vi, Jayne et al. 1999). Nevertheless the output of the small hammer mills now dominates the urban and rural maize market in Zambia. It is clear that the impact of market liberalisation on urban maize prices in Zambia has been to increase them, so that even the cheaper whole meal is more expensive than the pre-liberalisation roller meal. Roller meal prices have trebled in real terms it appears. Fluctuations in price over the year are now very common also (Jayne et al. 1999).

In Nigeria, by contrast marketing boards focussed mainly on export crops and there has been a long established private trade in basic grains and other foodstuffs. It is important to bear these rather different histories in mind when examining the potential for positive state interventions in food marketing in the 21st century.

Like NGOs, governments may play an important role in credit provision, especially where commercial banks find costs too high for them to operate. However, Kelly et al. (2003:392) observe the poor performance of government credit programmes across Africa, citing Zambia's programme as a case in point: repayment rates there are only 30-40%. Nonetheless, they also note that greater success is possible, citing the case of Ethiopia, where a firm stand was made on repayment by government (arrests and confiscation of assets following non-payment) and a repayment rate of over 98% has been achieved in most years. Even so, there are issues around rent-seeking associated with both these countries.

Maxwell (1997) argues that food insecurity in African cities is relatively invisible to policy makers and is scarcely recognised in contemporary political debate (although this is certainly not true of Zambian governments). This is particularly disturbing since urban poverty will most probably become the dominant source of food insecurity in the 21st century yet there are no methodologies adequately designed to conceptualise and monitor urban food insecurity (Devereux 2001: 219). While democratisation and decentralisation, in theory, strengthen local and municipal governments, this places increased demands on their already strained capacities. They are commonly unable to cope adequately because weak capacity and limited financial resources are characteristic of conditions at this level

(<http://www1.worldbank.org/publicsector/decentralization/4/22/2003>). The potential of the urban poor - whether poor consumers or poor petty traders - to participate in local political processes remains uncertain. This he sees as a major issue for urban

food security researchers. Maxwell suggests that urban food insecurity is obscured from the view of urban managers by more urgent urban problems such as unemployment, massive growth of the informal sector, overcrowding, decaying infrastructure and declining services, although he recognises that food insecurity is directly linked to all five.

6.1 Central government

In terms of central government, Maxwell (1997) proposes that national policymakers have tended to focus less on urban food insecurity 'than on food insecurity in rural areas, where it is typically a more seasonal and community-wide phenomenon.' This is linked to a 'long-held belief that urban populations are better off, or even favoured'. Unless major food supply problems emerge and simultaneously affect a large number of urban residents, creating political problems (such as those instigated in the early phases of SAP in the early 80s - see below), they are unlikely to attract policy attention from national food or nutrition policy planners. Food insecurity at the household or individual level, per se, does not attract such attention.

Consequently, the problems faced by groups like the secondary school pupils from poor families at school in Sokoto (Nigeria) interviewed by Swindell et al. (1999), who are finding it difficult to survive in the city, receive little assistance. Indeed it is common now to find such students and other similar disadvantaged groups engaged in weekend rural farm labour in this region in order to survive. Swindell et al. (1999) note that in this northern Nigerian context, although the grain markets at local and regional levels continue to be organised and controlled by the merchant classes and *sarauta* (rulers), in recent years food markets have also been restructured by breweries and food processors, by the state and by international agencies, 'which can shape and reshape markets, as has been so apparent with structural adjustment programmes' (Swindell et al. 1999:400). They make the important point that the Nigerian state is not autonomous, not well insulated from political and ethnic pressures and not well able to punish the non-compliance of private entrepreneurs.

In Zambia, where state intervention in grain markets was firmly established in the colonial period (Jayne and Jones 1997), the pattern of local food consumption, notably the emphasis on maize, led to a narrowing of marketing options to single channel grain boards. This restricted maize supplies to only a few selected licensed millers and led to the development of large-scale grain milling using roller mill technology. The mills produced an expensive, refined product 'with a de facto monopoly on maize meal sales to cities... and stifled the development of more decentralized agro-processing industries' while allowing government to implement price controls on maize meal. By the 1980s urban consumption of maize had switched entirely from wholemeal to more expensive but less nutritious refined meal (Jayne and Jones 1997:1509, citing Jayne et al.1995).

The ultimate demise of Zambia's state marketing boards in the late 1980s was encouraged by their high costs and farmers' increasing recourse to parallel markets, causing heavy trading losses to the boards. Although NAMBOARD was abolished in 1989, state intervention in grain markets continued through the 1990s (Jayne and Jones 1997).

Subsequent government interventions in the maize import market by the government's key agency in this sector, the Food Reserve Agency (FRA), established in 1995, have continued to favour the large mills. The FRA's primary remit from the government relates to food security. When there is a shortfall in locally marketed maize compared to domestic market demand, imports are then needed (Giovannucci et al. 2001). The FRA's interventions attempt to prevent maize prices for consumers fluctuating sharply, (although it is worth noting that Zambia exported maize, in decreasing amounts, every year from 1995-2000). This can depress prices and is argued to discourage farmers from producing (Farrington and Saasa 2002, Nijhoff et al. 2002). On the other hand the country's largest commercial farm dramatically increased its profitability in 2002 due to grain price increases because of drought (IDL 2002:18) which suggests that prices are still responsive to domestic production.

The FRA's channelling of its maize imports to the larger mills means that the more expensive refined mealie meal is favoured. This may not be in the interests of the urban poor (Jayne et al. 1999 pp. 9-10, Mwiinga et al. 2002). Nijhoff et al. (2003) stress the fact that urban smallholders and commercial farmers combined are more important than rural smallholders in supplying maize to urban centres. Consequently, the Zambian study (should it include maize) will need to examine the commercial and urban smallholder maize-supply chains, while also taking into consideration the third major source of urban maize supplies, imports. Nijhoff et al. (p.14) note that import channels are not well designed to supply the informal outlets which in turn supply low income urban consumers. Imports have been channelled entirely through the large mills which produce more expensive meal. They suggest that to meet the needs of the poor, there may be a role for government to facilitate the supply of maize to informal markets in small lots to supply the small traders and the hammer mills which produce less expensive meal. Again, this needs further investigation.

The IDL group (2002:iv) note the trend away from maize in Zambia towards other food crops including cassava, groundnuts and millet over the last decade. Groundnuts are particularly profitable and have a very good market (Bangwe 1997). The other crops may be more problematical. It is worth noting that a similar shift into cassava was 'recorded' in Malawi in the 1990s and led to the view that the food crisis in 2002 was somewhat exaggerated - unfortunately the information about cassava was entirely erroneous and may have helped to delay the necessary food aid to that country (Devereux 2003). Farrington and Saasa (2002: ix) suggested that there was little opportunity to influence the maize sector, because the former President viewed this as his personal domain, thus implying that it was more productive to concentrate on improvements in the marketing of such other crops, livestock and livestock products. However there has since been a change of President, so this needs to be kept under review. It is also important to note that cattle disease led to a disastrous fall in national cattle numbers, which more than halved between 1996 and 1997 (Republic of Zambia 2001).

le Clus and Mwale (2004) argue that interventions like the Fertilizer Support Programme and direct food aid programmes are effective in Zambia as they are closely targeted, whilst maize import subsidies are not. With respect to urban food supplies however, it needs to be noted that these targeted subsidies cannot help the urban poor. They also report that the maize prices offered by the government's Food

Reserve Agency (FRA) tend to become a ceiling price, keeping prices too low. le Clus and Mwale point out that if the FRA confined its purchases to 'areas where the market does not reach', it would not disturb the market for private traders. Unfortunately, as made clear elsewhere in this review, these are (rather obviously) the remoter areas, poorly serviced by transport, where transaction costs are high, which is why the (private) market does not reach them. The costs to the government of such a strategy would inevitably be extremely costly. Prior to liberalization the government did operate food purchasing in such areas, the costs being cross-subsidised by purchases in more accessible districts. Since even this proved quite unsustainable, the ZAMTIE suggestion could only function with sustained donor support which does not seem to be the intention.

Again and again the literature indicates the preference, due to inexorable economic logic, of such traders focussing, in particular, on the line-of-rail. In other, sometimes termed 'disadvantaged' areas, traders are unable to offer prices sufficient to cover the cost of inputs for some crops. Thus, a DFID-commissioned report on *Zambian agricultural trends in 2002*, notes that *'the multiple constraints facing poor people mean that access to improved opportunities through higher value agricultural production is often limited or non-existent. Significantly, the highest proportions of the rural poor are based in Provinces away from the line of rail, where higher transaction costs and poor infrastructure can greatly restrict access to (and development of) services and market opportunities'* (IDL 2002: p v).

In Zambia the sudden bulldozing of markets, without giving marketeers a chance to respond in any way, has unfortunately occurred both for informal markets in the 1990s (Blunt 1997) and this year (2004) for the biggest wholesale market in Lusaka, Soweto market. In the latter case this was ostensibly to improve drainage, which was unquestionably necessary, but it is apparent from newspaper reports that major re-organization of those with access to market spaces has occurred. The livelihood outcomes for hundreds of households are a matter of major concern.

In Zambia a very important, and very large-scale urban markets programme, funded by the European Development Fund, is currently under way. According to the project reports and evaluations this is a response both to the appalling physical conditions of current markets throughout the urban system and to the fact that the massive increase in urban, informal activities as a response to increasing poverty, required further development of markets. The project also includes improvements in the management and institutions of markets and is thus of fundamental relevance to this study (Government of Republic of Zambia/Economic Affairs Division, National Authorising Officer of the European Development Fund 2002). Political control over Zambian markets is considerable. The ruling party uses markets as primary sites for political activity and fund-raising, with marketeers paying weekly levies to the party. This issue is of key significance for understanding the current institutional parameters of Zambian markets.

6.2 Local Government

City and Local Authorities have a range of potential responsibilities that are associated with urban food security and food marketing: these are summarised below. However, as Ellis and Sumberg (1998) point out, it is important to be cautious about the capabilities and constraints faced by municipal and government authorities, "and

not to advocate measures that are unenforceable, unsustainable or susceptible to capture by stronger social groups at the expense of the weak” (p.220). Their one firm policy conclusion (p.221) is that “government and municipal authorities should in many instances abandon the charade of attempting to prohibit food production activities in towns ...[since] the welfare of the urban poor is best served by permitting them the widest possible range of opportunities to piece together their livelihoods”.

The major constraints on local government reported in the literature, included lack of staff capacity to design and implement programmes, lack of financial resources and, central government influence and a lack of dialogue with the private sector (Argenti, 1999). Mustapha and Meager (2000:36) note in a Nigerian context that the local government councils have ill-defined constitutional powers and suffer from lack of capacity, interference from the state level and corruption. In Zambia, Nchito’s study of corruption in urban markets (Nchito 2003) provides an important analysis of the failures of market management by local councils.

The fact that urban population growth, mainly now from natural increase within the city, is occurring so rapidly in sub-Saharan Africa is a further complication: the expansion of informal settlement requires provision of associated basic services, including market facilities.

Local authority responsibilities include:

- the formulation of urban or municipal policies;
- the execution of investment and development programmes;
- the planning, constructing and management of urban market physical infrastructure, food loading and unloading areas, slaughterhouses, docks, stations and transport infrastructure
- the maintenance and upgrading of public infra-structure as well as the provision of water, toilets, lighting, drainage, sewage and waste disposal;
- the regulation of public land occupancy and construction;
- the levying of municipal taxes and market fees;
- the control of food quality and sale-point hygiene;
- the promotion of security throughout the urban areas;
- the regulation of commercial activities; and
- the control of unauthorized food-trading activities.

Adapted from Argenti (1999)

However, the likelihood of local government being able to take on these activities is fairly remote without greater fiscal capacity. In Nigeria although markets are under the control of local government, Anyanwu and Jukes (1991) observe that they collect levies but are not active in areas of hygiene or environmental sanitation, despite the fact that food and market sanitation are within their remit. Electricity, water supply and sanitation is rarely adequately supplied to urban markets. Many of the public health laws, by-laws and ordinances are out of date and irrelevant to contemporary local food conditions. On the producer side, there seems to be poor representation and little ability to lobby local government among small-scale farmers. The ability of local governments to sustain activities in the marketing/food supply arena, as in other areas, is constrained by shortage of funds, as Adubi (1996:28) observes in the context

of urban Lagos where local government is now expected to regulate urban markets.

Adubi (1996:vii, 26) noted that the Nigerian government's current intervention in marketing was limited to registration of market associations (which have to have a minimum of 50 members in Lagos State and for which an annual fee is charged to the association), infrastructural development, maintenance of facilities, revenue collection and dispute settlement, with this control and administration of markets being in the hands of local government.

In Zambia local government (along with traditional authority and CBOs) has also been weak though Farrington and Saasa (2002:viii) suggest that decentralisation may increase its capacity. Experience elsewhere in Africa is not encouraging in this respect: devolution of responsibility tends not to be accompanied by adequate disbursement of state funds to local government as a large and growing literature attests. There is a real resource constraint here as well as a reluctance to devolve real power.

Finally we need to consider broader issues around urban and rural governance and development planning, which typically take place in separate spheres. A recent UNDP study in Nepal suggests that information flows and coordination between rural and urban areas have been impeded by conventional approaches and can be much improved by getting municipalities to institutionalise linkages with rural hinterlands and link rural development schemes to municipalities (Rabinovitch 2002). Their Rural-Urban Partnership Programme (RUPP) may be worthy of further examination regarding its application in African contexts.

Key questions on central and local government roles:

- What is the current pattern and level of central and local government involvement in urban food supply, marketing regulation and facilitation in the case study locations?
- Is it sustainable?
- Is there potential to increase their involvement? In which areas?
- Is there need to reduce their involvement (i.e. reduce excessive regulation)?

6.3 Government legislation and enforcement

The wide range of functions of formal legislation on food systems is shown in the table below. In Nigeria, much formal legislation, for instance pertaining to food control/adulteration was introduced during the colonial period and this has been extended and developed over recent decades (Anyanwu and Jukes 1991).

In both Nigeria and Zambia, the gap between formal legislation and its enforcement is massive. As the IDL group observes (2002:14), for instance, Zambian agriculture, like that in much of sub-Saharan Africa is 'served by weak public sector institutions and legal/regulatory environment'. In Zambia the passing of the Agricultural Credit Act is perceived by Mwanaumo (1999:23) as a 'very welcome development'. It covers interest rates and charges, fees and penalties and defines the obligations of both borrower and lender and deals with issues such as crop piracy when traders buy from farmers who have taken out loans from other traders. However, Mwanaumo notes that enforcement is weak and suggests that this has led to financial indiscipline

in the credit market and hampered the development of successful outgrower schemes.

In Nigeria, Fadahunsi and Rosa (2000) describe many of the strategies (developing friendship and trust relationships with critical officials, false registration documents, concealment of cargoes, etc.) used by traders to keep rent-seeking and predatory state officials at bay in the context of cross-border trade: our personal knowledge suggests these are frequently applied in rather similar ways in other trading contexts. Interestingly, they note that the impact has not been entirely negative: it provides livelihoods for vast numbers of intermediaries, and has arguably been one means whereby multinationals have been kept out of a massive and sometimes lucrative market!

To a large extent regulation and legislation has been developed to ensure competition and efficiency, although this needs to be combined with regulation that will have a positive impact on poverty reduction (Cook and Minogue 2003). In many African economies, producers, consumers and micro enterprise traders have a lack of trust in formal legal systems. The way that they are used tends to be shaped by context, institutional framework and legal culture. The problem of enforcement and its entanglement with rent seeking practices is widespread in a trading context as in so many other areas. Successful use of legislation requires the ability to enforce compliance and transparency of the process of enforcement (Cullinan 1997). Regulation of profit making activities can create substantial opportunities for corruption. This risk is accentuated when regulation is based on unnecessary licensing requirements and on decisions by many separate and decentralised individual decision makers with discretion, rather than on regulations based on rules (Ogus 2003). The details of enforcement arrangements and supporting institutions may need to be more explicitly addressed and adequately financed. In some cases, it may be more sensible to abolish specific licensing forms as Ogu (2003) suggests. As he points out, many forms of business create no significant risks for the community and thus do not need entry controlling by requiring a licence (id21.org/insights/insights49/insights_iss49-arto4.html last accessed 18/02/2004).

Functions of legislation

Enabling functions which provide the essential legal framework for the marketing system. Enabling functions are performed by laws which establish:

- laws of contract which clarify the consequences of certain transactions and allow commitments agreed between the parties to be enforced in court and so permits the evolution of more complex commercial transactions which go beyond direct barter exchanges;
- property rights and rules to protect it (such as the prohibition on theft), and therefore define what can be sold and who is entitled to sell it;
- mechanisms for constituting a group of individuals as a legal entity (such as a company or cooperative) which is entitled to assume rights and obligations in its own name;
- laws of exchange, (e.g. recognising warehouse receipt as negotiable documents of title so that ownership of stored grain can be transferred by transferring the document); and
- security laws (e.g. rules allowing movable goods such as grain or warehouse receipts to be pledged as security for a loan).

Economic Regulatory functions which seek to promote, guide and discipline the operation of markets. This function would be performed by a wide range of laws, including

- Laws dealing with competition, (anti-trust laws, prohibiting cartels, price fixing and unfair competition)
- Uniform weights and measures,
- Food quality standards
- Tax.
- Other mechanisms such as unwritten market rules and standard contracts adopted by market authorities or trading associations, may also serve to regulate the economic functioning of markets.)

Constraining functions designed to restrict the operation of the market in some way in order to avoid socially undesirable consequences. Typical examples of this are found in

- Consumer protection and health and safety legislation (e.g. laws establishing maximum residue limits for pesticides in foods, packaging and labeling)
- Hygiene on premises, location of sales of food, siting of food processing
- Dates and frequency of markets, controls on the sale of food through Town Planning laws
- Controls on the storage of food (anti-hoarding legislation)
- Licensing of traders and ability to form organisations/associations
- Laws preventing special interest groups dominating
- Laws dealing with environmental protection

Adapted from FAO (2001) and Cullinan (1997)

Cook and Minogue (2003) make a distinction between a fixed model of regulatory best practice with ‘rule based procedures and institutions amenable to sound legal jurisdiction’ and more flexible systems that allow developing countries with a poverty reduction agenda to slant their policies to help the poor as and when necessary.

These forms of regulation may be formal legally binding controls such as national or regional laws, or be less formal bylaws of associations, or be traditional customs based on norms and trust, and enforced by social pressure. There are likely to be ways in which regulation could be improved to facilitate broader levels of access for poor producers and producer-traders and more efficient (and cheaper) marketing and distribution which would benefit urban consumers. In many transactions there is a combination of national or self-regulation. Self-regulation by trade associations and other groups is particularly important for complementing national legislation in settling minor disputes in quick, cheap and effective manner (Cullinan 1997). This is discussed in the next section.

Key questions around legislation and its enforcement:

- What are the laws and regulations (see table above for a checklist)? How do they affect (positively or negatively) different groups (in particular urban and rural poor)? How are these enforced (examples if known)?
- What restrictions are there on enforcing this law?
- What are the compliance costs?
- How do people get around the legislation?

6.4 Standardisation of weights and measures

Standardisation of weights and measures throughout the marketing chain is often called for. In Nigeria the Weights and Measures decree of 1974 aimed to ensure uniformity of standards, with provisions for regulation of units of weight and measurement, packaging etc. and provision for inspections to check on weights and measures (Anyanwu and Jukes 1991). Across much of Africa, volume measures are still the norm. Although volume measures are susceptible to trader manipulation, Clark (1994:142) points out, they permit easy visual inspection of the unit size by the buyer, who thus does not have to depend on public regulation of weights and measures. However, Wan (2001) in a detailed study of the gari supply system to the major urban centre of Ibadan (south western Nigeria) draws attention to the critical role of method of measurement and the combination of concealment and display which may accompany the process.

In Ibadan's urban markets there are three types of seller, each with a different profit margin: the gari processors, the wholesalers, and the retailers. They may all sell at the same price, but will not be using the same method to measure. 'Consumers are unable to determine which trader is a wholesaler and which trader is a retailer till the measuring begins. Measuring is the single most important skill to acquire in the practice of the gari trade (p. 233). Measuring out numerous full-size bags is an arduous, labour-intensive task which generates much debate and dispute. It has to be done because of 'the absence of weight standards and a fundamental lack of trust between buyers and sellers' (p. 234). In coastal Ghana, women farmers from off-road villages say they are often deterred from trading in more distant (and more profitable) urban markets precisely because of the potential disputes over measurement with unknown traders (Porter 1999). This appears to be an obstacle which would not be removed simply by the institution of standardised weights and measures: indeed, the requirement to purchase such measures would probably put many petty traders out of business. It would also entail a high level of policing. Questions then arise as to who should do this: local government, trader associations or consumer associations.

In Zambia, the Zambian Bureau of Standards is theoretically supposed to set and enforce agricultural standards but it is unable currently to do so. le Clus and Mwale (2004, p.7) report that 'since the deregulation of the markets, the use of grades and standards ...is virtually non-existent'. In these circumstances of very little standardisation of weights and measures, traders often have to check the bags offered by re-measuring the commodity out into the 'tins' so ubiquitous in the region (Chomba et al. 2002).

On the consumer side Giovannucci et al (2001) report that the general manager of the country's largest food retailing operation estimates that more than 90% of his customers are primarily price oriented, that a number of Zambian products meet basic domestic quality demands, and thus that grades and standards within Zambia for food are not a primary issue yet (ibid, p. 29). There are evident resource constraints operating within most of the official institutions tasked with monitoring food standards. For example, city councils are meant to inspect the food service industry and food processors in towns, but due to having very few staff, only the larger industries tend to be monitored.

Moves are afoot however to introduce grades and standards for maize, and a draft has been circulated recently by the Zambian Bureau of Standards. ZAMTIE recommends that a workshop should now be held by the Department of Agriculture and Cooperatives to ensure that all interested parties are consulted on this, before it is published and used (le Clus and Mwale 2004).

This study will examine the extent to which there are rules establishing standard weights and measures, whether these are enforced and who is responsible. Legislation on standards of quality, weights and measures are particularly important when using contracts for future transactions. In such cases standard contracts are required which standardise and clarify issues such as: the date when the transaction is binding; the terms of sale; the margin of tolerance for quality, responsibility for loss or damage, and consequences of delay (Cullinan 1997).

In terms of more specific policy issues regarding standards, Fafchamps suggests that membership of traders' associations 'could, in principle, be used as a guarantee of good quality and conduct. An association equipped with a grain-dryer and simple grading equipment could bag and certify its products in a manner that is difficult to falsify. Assured of the quality of the goods they purchase, buyers may be more willing to place orders by telephone. ' (p. 39). This is an issue which will need exploration in Nigerian and Zambian contexts. There are parallels here with the role of mediaeval town guilds in Europe, although the technology has changed!

Key questions on standardisation of weights and measures

- What types of weights/measurement are currently prevalent among different trader groups in the case study locations?
- What government legislation re weights and measurement is currently in place?
- To what extent is it enforced and with what consequences?
- How do different types of traders perceive the weights/measurement issue?
How do regulators perceive it?

7. ROLES OF FORMAL AND INFORMAL ASSOCIATIONS IN REGULATION

7.1 Self-regulation: the role of trader associations

The role of market associations, women traders and their livelihood strategies and credit access, issues of ethno-domination of trade channels and the role of transport unions are likely to be important themes. Agricultural market traders often form associations which have a number of roles. These include dispute resolution (Whetham 1972), providing welfare support for traders, building market infrastructure (Smith and Luttrell 1994), sharing market information (Smith and Luttrell, 1994) and lending to each other. Much of the detail on market associations is based on past research in West Africa; again there is markedly less information on conditions in Zambia and much of southern Africa. We need to know, both in Nigeria and Zambia, the extent to which such associations currently support urban and rural traders and whether they enable poor urban people to obtain food at more affordable prices in locations where they work well, the extent to which they include or exclude informal producers and the extent to which they could be improved to provide a better service to both urban and rural producers, traders and urban consumers.

Adubi (1996: vi, 23) takes a conventionally negative view on the associations. He notes the powerful institutional influence of market associations in the operation of Lagos's food marketing system. He suggests that their role is 'domineering (p.23) because buying and selling cannot be carried out in wholesale or retail markets there without being a registered member of a market association: and later refers to them (ibid:40) as a 'menace'. Even spontaneous marketers reportedly have to register! 'Every food trader is put under pressure to belong to a market association' (ibid p.27): but the penalties for non compliance are not discussed. He argues that the associations 'virtually control the operations (real and price) in the markets (p.27) and suggests that restrictions become more stringent as one moves higher up the trader ladder from retail to wholesale. 'They are a major source of high price differential between landing prices of foodstuffs and retail prices'. (p. 28). However, he also observes that 58% of his trader sample found it easy to join a market association and 'over 80% agreed that market information is readily available through the market association and local governments'. It is unclear how specific categories of trader are affected by the associations. An interesting point which emerges from his discussion is the suggestion (1996:40) that trader associations may be inter-market and inter-regional as well as intra-market. The nature of such linkages could merit further investigation. Miracle (1962) found a very few examples of traders regulating competition through association in Copperbelt markets: charcoal producers in Ndola, for instance, and another hawkers association near Kitwe. However the economic circumstances in the Copperbelt are now quite different and there is a lack of up-to-date information on informal traders there (although there is ample anecdotal evidence that informal activities and urban and peri-urban agriculture have become vastly more significant).

Ayodele Ariyo et al. (2001) in their study of rural and urban grain traders in the Kano region observe that all 30 urban traders they interviewed belonged to two traders' associations, one of which served as a link between traders and government, and existed principally to negotiate taxes, market infrastructure and security, whereas the other was a commodity-based association aimed at promoting cooperation between

local and stranger traders. These latter associations facilitated dissemination of information on supply, demand and prices and also aided business transactions and grain deliveries. The grain traders association was said to provide benefits of market information, security of stores, links with traders and 'a peaceful atmosphere in which to conduct their business' (p.23).

By contrast Ayodele Ariyo's sample of 30 rural grain traders does not include one with membership of any traders' association, though they note that the markets are organised along commodity lines with section leaders who arbitrate disputes as necessary. The local government provides market infrastructure and maintains security in the rural markets where they operate: traders pay fees each market day. A similar pattern was observed in the Jos plateau study in 1991 where urban traders were more likely to belong to a trader association than rural traders (Porter 2001). Onah et al (1998) provide a rare example of two vegetable producer/trader associations (in a peri-urban area of Enugu) collaborating to avoid glut in local markets by selling vegetables on alternate days (a similar practice occurs in the Anloga region of southern Ghana.) The extent to which such collaboration through producer/trader associations occurs in practice in the perishable commodity sector across sub-Saharan Africa is unclear. There are other related associations operating in many market contexts. Adubi (1996:26) for instance notes the strong association of load carriers in Lagos markets which 'does not allow for free entry'.

Similar work on trader associations in southern Africa, rather than individual traders or sectors, is much rarer. A recent study in Bulawayo, Zimbabwe, discusses the emergence of a new informal traders' association in that city in the mid-1990s and its attempts to liaise with the local city authorities to improve the traders' situation. The provision of shelter and an end to police harassment were their main objectives (Clark 2000). Although their success was relatively limited at the time of the study, the institution was very new so this was not surprising. Significant work has been done by Tripp in Tanzania on the gradual formalization of parts of the informal sector in Dar es Salaam since economic liberalization and the political interaction there between sectors of informal workers and the government (Tripp 1997). However, while these studies include food traders, they do not specifically focus on that sector.

Within Zambia, food trader associations currently play a small role. Given the potential importance of their role, one of the main recommendations made in the ZAMTIE report on the maize market (le Clus and Mwale 2004) is the establishment of a food trader association for maize. Small traders should be encouraged to join and, apart from being an advocacy group to government, it is argued that the association would both help to regulate small traders' practices when buying from small farmers, and help to protect the small traders from 'exploitation by ruthless [presumably larger] buyers' (ibid, p. 4).

Key questions on trader associations:

- To what extent are trader associations active in the case study locations?
- What is their role?
- Do they improve the access of the urban poor to safe, cheap food? If not, why not?
- To what extent do they include or exclude informal producers?

- To what extent could they be improved to provide a better service to urban producers, traders and consumers?

7.2 Bargaining and pricing procedures

Markets are also the arenas for price setting. In Ibadan (Nigeria), Smith and Luttrell (1994) report that trader groups have the ability to fix prices and supplies. Smith and Luttrell (1994) in their study of Ibadan found that cartels were beneficial in that they allowed protection for limited working capital and the traders could provide long term services that would not be possible otherwise because of the high transaction costs involved in trading. This view is supported by earlier studies in Nigeria by Whetham (1972) and Jones (1972). However, Harriss (1982), in a review of marketing studies in West Africa found that such conclusions require considerable quality data that is often not available or not analysed rigorously. There is insufficient work in other Nigerian cities or in Zambia to allow comparison and review on this issue.

Key questions on pricing

- To what extent does price setting among trader groups occur in the case study markets?
- What are the consequences for individual producer and trader types and for urban consumers?

7.3 Market security: youth vigilante groups

Youth vigilante groups have become an important feature of the African urban scene since the 1980s. In southern Nigeria, in particular, the widespread mobilisation of youth in contemporary civil disorder has become an important feature of everyday life (Alemika 2003), including lorry park and market life (since markets and lorry parks are often spark-point locations: the Institute for Peace and Conflict Resolution's 2003 conflict assessment report refers to a number of cases where they represent potential causes of conflict). Gore and Pratten (2002) suggest that youth-led identity-based social movements have become a popular counter-narrative to the legitimacy of the Nigerian nation state, part of the response to the 'politics of plunder' in which ethnic militias are a significant component.

Urban youth gangs, or so-called Area Boys, have contradictory and ambiguous connotations, being associated sometimes with community enforcement, vigilantism in markets or street cleaning, sometimes as political thugs or intermediaries in the drugs trade. The Area Boy groups control defined areas, where they aim to regulate the flow of goods and services to their advantage. They may thus obtain first call on casual jobs in the market or operation of motor parks. They have reportedly fought for rights against local councils and the National Union of Road Transport Workers to issue daily operating licences and collect commission from vehicle loading across southern Nigeria. Often these rights are limited to times beyond normal operation of the sites, but still help exacerbate conflicts between rival groups and between locals and strangers. At Christmas in New Benin market, for instance, fires have reportedly been started at night as a cover for looting, leading to widespread destruction. There punitive sanctions and exclusionary tactics have been sufficient in some cases to force stallholders out of the markets. This is a phenomenon which, since the early 90s, has been an increasingly significant component of Nigerian market life: an informal institution with the potential for massive disruption.

A recent paper by Aboderin (2003) has broadly charted poor communities' perspectives and action on safety, security and informal policing in selected local government areas of four Nigerian states: Benue, Ekiti, Enugu and Jigawa. This paper emphasises, above all, the lack of youth employment as a major cause of crime in both rural and urban areas and also makes important points about the significance of roads and electricity to crime control. There is no specific information, however, pertaining to markets, transport and trade. No comparable studies are available for Zambia.

Key questions on market security youth vigilante groups:

- How prevalent are urban vigilante youth groups in the study locations?
- What do they do?
- In what ways and to what extent do they improve or hinder food supply to the urban poor?
- In what ways and to what extent do their activities impinge on producers, specific trader groups and other stakeholders?

8. OTHER EXTERNAL ACTORS

8.1 The role of NGOs in improving market institutions and urban food supplies

NGOs have a rather longer history in Zambia than Nigeria: their focus tends to be more towards input supply (including credit) than output marketing support to farmers. Bingen et al. (2003) observe that NGO-mediated projects in Zambia have been an important source of agricultural goods and services for small farmers, and cite the case of World Vision's credit programme which, after 10 years, is to be handed over to participating communities in the expectation that it will become viable self-sustaining credit activity. Oygard et al (2003: 20) discussed the role of the warehouse receipt systems (a private sector development which aims to work with NGOs) and suggests it has the potential to reduce post-harvest losses, to promote sight-unseen trade with millers in Lusaka, promote grades and standards and provide an option of deferred sale which will reduce supply and price variability with consequent benefits for urban poor consumers. In Zambia, NGOs are playing a substantial role in service delivery to small farmers, in the absence of adequate government or private sector services. CARE's Rural Enterprise and Agri-service Promotion programme (REAP) (supported by IFAD), aims to promote market-oriented enterprises. Further research is needed to know how successful this is perceived to be by participating farmers, and whether it can be replicated more widely.

A review of the recent massive expansion of NGOs in Nigeria notes that they mostly suffer from severe institutional and policy constraints (USAID 2001:11-12). Okunmadewa et al. (2001:96) in their survey of poverty across Nigeria, observe that one of the significant findings across all regions is the absence of 'competent and responsive NGOs'. Akuto and Ihaji (2000:iv) also state that CBO/Local government communication is commonly poor in Benue State, and it is likely that this will be the case more widely across Nigeria (as it is in Ghana and elsewhere in sub-Saharan Africa).

In Nigeria, few NGOs have been able to deliver credit services effectively and in those cases it has only been possible with massive donor funding and technical assistance (USAID 2001:11). There are reportedly a number of regulatory constraints which limit their effectiveness (ibid:11). Nonetheless, as the USAID document and other literature observes (e.g. Okali et al. 2001:54) note NGOs and other civil society organisations, notably town development unions, are playing an important role in a variety of ways, such as in contributing to provision of a wide range of facilities, including markets and transport. In many cases there has been collaboration between CBOs and government, such that CBOs provide the infrastructure and government then contributes to their operation. Nonetheless, it is likely that collaborative efforts between NGOs/CBOs and local government could be substantially improved.

One of the most important contributions which NGOs can make, according to Bingen et al. (2003), is in broader capacity-building so that farmers can make their own social and economic choices: literacy and numeracy followed by business skills and management training. They cite the valuable work of CLUSA in East and West Africa and the Economic Expansion in Outlying Areas (EEAO) programme in Zambia but emphasise the dependence of this approach on long-term commitment and willingness to emphasise less easily observed, more qualitative programme outputs, rather than the more common indicators of sales volume or market transaction costs.

Key questions on NGO involvement:

- What is the current pattern and level of NGO involvement in case study locations?
- Is it sustainable in the long-term without large-scale subsidy?
- Is there potential to increase NGO involvement? In which areas?
- Is there potential to improve NGO/Local government collaboration?

8.2 The role of traditional authorities in market regulation and facilitation

In Zambia Farrington and Saasa (2002: 15) argue that traditional authorities are rarely significant players in decision-making or service provision. They are however still important for land allocation for the vast majority of smallholders and land dispute arbitration. Traditional authorities in much of West Africa, including Nigeria, can have control over substantial portions of communal land, not least in peri-urban areas, and may be in a position to mobilise community labour. They may thus be in a position to play an important role in local community projects including market development.

Key questions on the role of traditional authorities:

- What is the current pattern and level of involvement of traditional authorities in marketing regulation and facilitation in the case study locations?
- Is it sustainable?
- Is there potential to increase their involvement? In which areas?

9. THE BROADER POLICY ENVIRONMENT: SAPS AND PRSPS

As Smith (1998) emphasises, a series of [neo-liberal] global processes have come to bear in recent decades on urban food systems in poor countries: enforced structural adjustment (evident in its latest guise as PRSPs), massive urbanisation and the globalisation of food cultures and supply systems: ‘it is undeniable that the global and local are constantly interacting, often through the medium of the local state.... As yet, in the context of urban food systems, this global/local dimension remains largely undiscussed’ (ibid: 210).

In the 1980s and 1990s, donor policy encouraged African governments to focus on ‘getting prices right’, and encouraging market forces to set prices, rather than leaving this to urban bureaucracies (Maxwell 1997, citing von Braun et al. 1993). A massive literature has charted the impact of structural adjustment policies on African cities. SAP market reforms (in Nigeria from 1986, in Zambia from 1991) brought serious price shocks in their wake. Zambia – as one of the most urbanised of African countries – was, perhaps unsurprisingly – one of those which experienced major political disturbances as a result of protests over access to food (Pletcher 2000; Maxwell 1997, citing Riley and Parfitt 1994). Nigeria also experience considerable unrest (Mustapha and Meager 2000). In Nigeria, but not Zambia, the loudest protesters were often the emergent middle class rather than the poorest. The impact on the urban poor in Zambia was drastic, leading to serious reductions in their consumption of all goods, including food (Bratton and Liatto-Katundau 1994).

Over time, Maxwell argues that the SAP reforms seem to have reduced problems in overall aggregate food supply to cities, where these existed (eg in access to controlled food in Tanzania), but that removal of major supply constraints has not prevented differences in access to food at the household or individual level becoming more acute. In fact aggregate urban food supplies have rarely been a major problem in southern Africa except in war zones. Others have shown how SAP devaluations have distorted local food markets in Africa. The massive increases in the price of imported grain in Nigeria, for instance, encouraged food processing companies and breweries to scour rural markets for cheaper supplies (Porter 1994, Swindell 1999). The sensitivity of market prices to macro-economic policies (with direct implications for food production) is particularly well illustrated by Ayodele Ariyo et al. (2001) in a detailed study of prices in metropolitan Kano markets, 1960-2000. They argue that although the SAPs imposed between 1986 and 1998 initially stimulated food prices and production, they also induced persistent hyperinflation which restricted purchasing power and thus led to subsequent dampening of demand. Inflation control by strengthening the national currency and lowering the interest rate are thus identified in this study as imperatives for stabilising prices and creating an environment which will promote investment. Yet these are precisely the forms of government intervention that SAPs seek to eschew. National currencies throughout Africa were meant to devalue under SAPs and that is precisely what happened which, in turn, leads to a period of hyper-inflation. This again means that interest rates, in order to be positive, must be extremely high.

A review of this work by Michael Mortimore, however, points out that when we examine *real* prices, the Kano food marketing system is not as dysfunctional as it might appear at first glance: there have, in reality he argues, been stable/declining prices because labour is being managed efficiently by farmers and intensification is

still occurring. He places much significance on the capacity of farmers to survive under stress, because of their social resilience (Seminar to Dept of Anthropology, University of Durham, February 2003.).

Tiffen (2003) suggests that a larger, more productive urban sector in Nigeria has enlarged the market for farmers and stimulated them to invest in improvements. The most efficient farms in the Kano region were found to be most numerous in high-density areas with good market facilities (p. 1354): here fadama farming of wheat and vegetables has expanded dramatically, despite having to cope with frequent changes and reverses in government policy (affecting the competitiveness of food imports, cost and availability of farm labour, cost of inputs such as fertiliser). Farmers were also found to have responded to growing demand for meat. The impact on the land market has been substantial. Smaller farmers without the capital to intensify production from their small land holding have been forced out into other occupations, while larger farmers who can play the markets more successfully buy up land. Drawing on research from sites in Kenya, Niger, and Senegal, in addition to Nigeria, she suggests that policies which increase the purchasing power of local urban communities are becoming more relevant to agriculture than export-oriented ones and places particular emphasis on good roads and telephones. However, she also stresses that aid agencies and national policy makers need to make public investments appropriate to the particular country and time 'and to be conscious that times are changing' (1362).

Nigeria's latest 'home grown' version of the PRSP, the National Economic Empowerment and Development Strategy (NEEDS), a four-year programme announced in September 2003, aims to increase growth to 7% from 2007. (It is to be used as the basis for debt relief from its Paris Club creditors rather than an IMF loan.) NEEDS focuses on macroeconomic stability, a prudent budget process, improved productivity, administrative reform, better delivery of public services, greater accountability and a more favourable climate for the private sector (Financial Times, 24/2/04).

In Zambia, by contrast, government 'seems to have a fundamental mistrust in a liberalized market's ability to ensure food supplies' (Oygard et al. 2003:17). As discussed above, this concern may not be entirely misplaced, in the short- to medium-term, because of the specificities of Zambia's economic geography and the empirical observations of swathes of smallholders losing access to markets and input services post-liberalisation. This has led to government organising maize imports in most years when there were perceived domestic shortfalls. [There were sporadic attempts at creating a Grain Reserve Scheme in Nigeria in the 1990s: Mustapha and Meager 2000:55]. This maize has been sold at below market prices to major millers (instead of to the small hammer mills which have lower processing costs), thus continuing to distort local food markets to some extent, although the essential ending of subsidies has removed by far the most important distortion.. Moreover, despite consequent reductions in maize prices in 2001/2, for example, Nijhoff et al. (2003:43, citing Nijhoff et al. 2002) note that the impact on breakfast meal prices in Lusaka was negligible. However, breakfast meal is the most refined form of the staple (hence its expense) and not necessarily a good index for food prices for the poor, unless no other forms of maize meal were available.

A Christian Aid policy briefing (Lambrechts and Barry 2003) observes that under the World Bank-sponsored structural adjustment reforms in Zambia, the grain marketing authority was replaced by the much smaller Food Reserve Agency which was 'intended to stimulate private actors in the food market. However, a lack of infrastructure has made it uneconomical for private traders to do business in remote areas and people have been left with no access to markets to sell their produce or buy inputs' (ibid 17). This reiterates the points made earlier by a number of other researchers and policy makers. It is clear that infrastructure is a major cause of this problem. However, the continued intervention of the state in food marketing over many decades, from the colonial period onwards, may have discouraged the development of the private, indigenous, trading sector. Again, only detailed research into private sector trade will confirm or deny this.

Pinder and Wood (2003) are similarly unoptimistic about the future for poor people under Zambia's PRSP, despite the fact that the PRSP identifies agriculture as Zambia's engine of growth. As suggested already in the analysis above, it appears that the government's Agriculture Commercialization Programme (ACP) – formulated at the same time as the PRSP - is not pro-poor and will lead to increasing poverty in remoter areas of designated low potential, although it will also probably build new partnerships between CBOs, NGOs and MNCs and promote new crop-specific single chain marketing systems (ibid: iv). They suggest that the ACP will widen the gap between poor marginal farmers and large and medium export-oriented farmers and point out that it says remarkably little about expansion of domestic and regional markets. They predict that urban consumers and retailers are unlikely to benefit from improved quality of locally produced food as most will be exported and will continue to be offered mainly imported products.

It could be argued that these criticisms of the ACP are unfair or, at least, mis-applied, because they appear to assume that a market-driven approach can deliver outcomes which it simply cannot. The crux of the analytical problem here probably lies in the tension between efficiency and equity which is at the heart of many debates over economic policy generally. It is possible that the logic of a market-orientated agricultural and trading policy, which the ACP avowedly is, in a country with the human and physical geographical characteristics of Zambia, will also cause major problems for the livelihoods and, thus, marketing abilities of a huge proportion of *relatively inaccessible* farmers.

9.1 Key questions on the broader policy environment:

- To what extent does the current PRSP/IFI intervention take urban food supplies issues into account?
- What are the implications of the PRSP/IFI intervention for urban food supply?

10. CHALLENGING THE POSITION OF TRADITIONAL INTERMEDIARIES: COOPERATIVES etc.

10.1 Cooperatives

In order to challenge the power of intermediaries, there has been a long tradition of programmes to support cooperatives in Nigeria as there has been across Africa. The negative experiences of public sector supported cooperatives reported in this study reflect similar experiences across the continent and in the rest of the world, particularly in regard to marketing of produce (Agbodeka 1984, Attwood and Baviskar 1988, Coulter et al. 1996). Cooperatives based on subsidy enticements such as credit, processing facilities or vehicles do not tend to encourage participation and rarely survive after the subsidies are taken away. This conclusion is supported by almost every study of producer cooperatives available (Coulter et al. 1996, Stringfellow et al. 1997, Aryeetey and Appiah 1995, Goodland and Kleih 1998, Lucey 1997; Harper 1992, Lyon 1999). (This is not to deny that they were hugely successful among large-scale farmers in South Africa and Zimbabwe.) Nonetheless, recommendations that farmers form cooperatives continue to appear regularly in policy documents (for example with reference to fadama farms in northern Nigeria in a paper by the managing director of Kano Agriculture and Rural Development Authority, in Swegle ed. 1994:95). Kelly et al. (2003) note that while cooperative associations in the early years of independence were often 'top-down, government-mandated organizations subject to elite capture and moral hazard' (p.389), there has been an effort to foster bottom-up (albeit still donor-led) associations in recent years and report their variable success.

Successful cooperatives and groups tend to be those that allow individuals to run their own businesses and do not try to have joint generation of income (Lyon, 2003b). Successful cooperative also rely on trusted and respected leadership. This can be limited in faction-ridden communities (Mishra and Shah 1992), so it is likely that cooperatives will perform better where all members are well educated and belong to the same ethnic or religious group (Baulch 2001:155). Kelly et al. (2003) stress the importance of developing farmer literacy and management skills and the benefits presented by the presence of strong contract-enforcement institutions, whether social, political or legal.

Despite their bad press, Zambia has a long history of efforts at government support to cooperative organization (Lombard 1971) and has recently promoted cooperatives for agricultural input supply, marketing, credit etc. through the Cooperative Act. Mwanaumo (1999:20) suggests the Act is being used as a tool to facilitate agricultural service delivery. Kelly et al. (2003) refer to a five-year CLUSA programme where maize yields for participating farmers have reportedly tripled and newly introduced cash crops (paprika and chillies) have increased net income. The impact of these groups with specific reference to marketing needs detailed examination. Questions have been raised about the cost of the CLUSA programme and consequent potential constraints on scaling up (Kelly 2003:390). CLUSA have apparently been trying to address these issues by creating local capacity-building NGOs, using volunteer extension agents, and creating Apex organizations for marketing and coordination functions (ibid.)

10.2 Farmers' markets

Farmers' markets have been seen to offer another potential route to eliminating traders (particularly in the fresh fruit and vegetable sector) in a number of Western countries. Recently experiments with this concept have recently occurred in India. A state-sponsored experiment in Tami Nadu, India (1999-) suggests that after rapid early expansion of the concept, a number have closed due to the high running expenses (salaries for staff, utilities and repayments on construction costs) (Tacoli and Devavaram 2003, IIED 1993). Although the markets may benefit regular users by cutting out the commission agents (and indeed all traders) and providing market information to producers, low-income consumers will only use them if they are within walking distance of their homes, and if opening hours fit in with daily work patterns. The concept is unlikely to have much relevance in West Africa where rather different cultural and politico-economic contexts prevail. There have been attempts at Farmer's Markets aiming at the higher income Zambian and expatriate communities in Lusaka with varying degrees of success.

Concern with absence of or deficiencies in market infrastructure per se is common. In Zambia, for instance, Oygard et al (2003: 21) observe that lack of infrastructure, including market centres, 'is often a main constraint to rural marketing'. However, in both Nigeria and Ghana there is field evidence to suggest that excessive preoccupation with providing infrastructure for new markets promoted either by the state (as in the case of ASIP markets in Ghana) or local leaders is a waste of money. Adubi (1996) reported that Government sponsored 'modern markets' in Lagos had been rejected by the marketing system although some of the markets had evolved into traditional markets (e.g Tejuoso market). It is crucially important that adequate assessments of market demand are undertaken prior to construction of an expensive facility (Porter 1988, 1997). Moreover, returning to the issue of farmers' markets, it could be argued that many of the smaller traditional West African periodic and daily markets in peri-urban areas have always had the function of providing direct producer-consumer interaction. In Zambia the concept may have greater relevance.

10.3 Contract farming and outgrower production

Another alternative to traditional marketing intermediaries is the development of contract farming whereby small producers grow crops on contract for a central processing or export unit (or, in South Africa direct supply to supermarket chains, see below). The contract may be with an agribusiness firm or with a public enterprise or parastatal. One of the advantages of contract farming is that it can provide input supplies and credit to farmers, undertake quality control and absolve them from marketing responsibilities. There has been some development of contract farming in Nigeria (Babalola 1992, Porter and Phillips-Howard 1994) and it is well established elsewhere in Africa. In Zambia the SIDA-funded programme for outlying areas (EEOA) has provided capacity-building for small-scale farmers. This has reportedly led to outgrower schemes where farmers provide seed which the grower repays in kind (RWA 2003: 8, 105): the scale of this type of development and its impact among small producers is not recorded and could be further researched.

Despite potential marketing advantages (noted, for example by Anyanwu and Jukes 1991:124, who somewhat naively propose contract farming as the solution to Nigeria's food supply problems), there are also substantial dangers, when small farmers contract to grow crops for large commercial companies, given the great

inequality in power between the two parties (see e.g. Porter and Phillips-Howard 1997). Development of contract schemes needs substantial care to ensure that small producers do not suffer. Concerns about the need for small farmer out-grower support and a code of ethical practice has also recently been expressed in Zambia (Pinder and Wood 2003). In Ghana the NGO TechnoServe is reportedly assisting small-scale producers to negotiate with and (abide by) contracts with large commercial buyers and this appears a useful approach (TechnoServe 1998) which may have application in Nigeria and Zambia and is worthy of further investigation. In both Zambia and Nigeria, contract farming tends to be stronger in non-food commodities (e.g. cotton and tobacco) and its current contribution to internal urban food markets in both countries appears limited. It is an expanding activity in Zambia (and will continue to be so under the ACP) for not only for non-food crops but for food crop production as well, focusing mostly on the export market. A feature of this market is that produce not reaching export quality is marketed locally instead, for example through Agriflora.

10.4 Supermarkets

We need to consider the potentially growing significance of supermarkets which have their own procurement systems. The potential of supermarkets to transform the food retail sector in urban Africa has increased substantially over the last decade. Weatherspoon and Reardon (2003) suggest that supermarket procurement systems will increasingly figure centrally in the factors that condition farmers' market access. In the 1980s this was probably principally a Nigerian phenomenon, and as discussed above, came to a sudden halt when the oil boom collapsed. However, Weatherspoon and Reardon (2003) have detected major changes in the sector some the mid-1990s, in southern and eastern Africa (led by South Africa and Kenya, but including Zambia), where they suggest supermarkets are now extending into poor neighbourhoods of large cities and into smaller towns: "the new trend in the region is 'supermarkets for the poor', a diffusion and extension of supermarkets....to being mass market merchandisers" (ibid: 333). These larger outlets already offer cheap food and convenience to the urban poor in Kenya, the former homelands of South Africa and parts of Zambia (ibid: 342, 351). They warn that this could lead to exclusion for smaller farms and firms from the transforming food economy because of the larger volumes, quality and safety standards they require. In Kenya supermarket development (which has 20-30% of food retail market share) has already impacted significantly on the horticultural products trade.

Zambia has already been colonised by the South African food retailer Shoprite (a chain which targets the poor) which has established 18 supermarkets there since 1996, following privatisation of a state-run retail business (ibid:339). The same company has plans to expand into Nigeria where there are now reportedly 102 supermarkets supplying about 5% of total food retail (ibid: 343, citing Nzeka 2002.)

Supermarkets have their own procurement systems and in South Africa where they are well established this has already led to the rise of intermediaries in wholesale markets that supply to supermarkets (ibid: 345) and to some direct contracts by supermarkets with (mostly larger) growers. Freshmark (owned by Shoprite), for instance, reportedly has no written contracts for its 300 South African growers because this is essentially a de facto buyers market, but farmers are informed of volume requirements, pesticide and microbial residue standards and quality attributes

of size, colour etc. (ibid: 348). Such requirements are similarly imposed by other companies. Growers will be expected to make daily deliveries of washed, packed, labelled and bar-coded produce in their own or rented refrigerated trucks and growers. They may be paid only 20-30 days later, so requiring farmers to have considerable capital assets to participate.

Outside South Africa Freshmark sometimes buys from small growers if it cannot source produce from larger growers already organised to serve the export market: in Zambia they send their trucks out to dambo farming associations to buy vegetables for Shoprite stores in Chipata (ibid:348). There are now also a few programmes to help small farmers supply these companies. One project started in Zambia in 2000 at Luangeni by overseas donors aimed to create a partnership between the community, Shoprite, Zamseed, NGOs and UK's then MAFF. It is reportedly now producing high quality vegetables for Shoprite in Zambia (though see Haantuba's review discussed below). Freshmark in Lusaka is also welcoming smallholders' produce of suitable quality to be delivered direct to their Lusaka depot, and has schemes to expand and consolidate the use of these suppliers in the future. Shoprite's procurement system in Zambia, however, also involves importing South African produce where the supply in Zambia cannot be secured. According to Weatherspoon and Reardon (2003) the firm argues that this has reduced average produce prices for consumers in Zambia. It also means, however, that Zambian horticultural producers now have to compete in a regional market, instead of just their local traditional market (ibid: 352).

A World Bank report (2003) confirms the mixed impact of these supermarkets in Zambia, estimating that 60% of the value of food items is sourced within the country, but that higher value processed and packaged foods are mostly imported. They list a series of factors which constrain local suppliers, including difficulties with consistency in product delivery, food safety assurance, and cash flow problems imposed by Shoprite's payment terms.

Some important implications of supermarket expansion in African food retailing to local urban mass markets for local farmers are suggested by Weatherspoon and Reardon (ibid: 351-2):

1. the need to supply in larger volumes individually, or to participate in tightly coordinated small-farmer schemes.
2. the signs of convergence between export standards and domestic retail standards: the two major chains in South Africa require food safety certification by laboratories that certify for export, hence the creation of stringent standards.
3. the need to be highly competitive in price while meeting stringent quality and safety standards, since the focus is moving towards supplying the urban poor.
4. A tendency to rely on imported supplies (from the sub-region) until local suppliers are able to reach required standards.

They predict the rapid exclusion of thousands of small African farmers from supply lists to supermarkets and large food manufacturers as has happened in Latin America, unless donor and governments help small farms to meet the 'challenge and opportunity of this retail transformation' (ibid: 352). Given this warning it will be important to gauge the current extent of supermarket involvement in Nigerian and Zambian markets, the potential for local transformations and exclusions, and the

opportunities for early development interventions to counteract potential negative trends.

Haantuba's very recent study of linkages between smallholder farm producers and supermarkets in Zambia (October 2003) certainly suggests that the challenges in Zambia are very substantial. His work illustrates some of the dangers of institutional failure and lack of mutual trust in the case of the Luangeni project: on the supermarket side this means that Shoprite only uses smallholder farmers as a back-up to Freshmark because it is unable to trust that farmers can comply with all their requirements. He suggests producer associations linking smallholders with supermarket chains as one way forward: again, this needs further research.

10.5 Commodity exchanges


Finally, in Zambia Commodity Exchanges have also been established. These provide centralised facilities, regular price information and estimates of futures prices. Mwanaumo (1999) suggests they provide traders with a transparent, efficient and low cost market place. Although as yet account for a relatively small share of the market, he suggests they have potential for expansion: 'the transparency in which prices are quoted on the commodity exchange, instils a sense of confidence in the open market place by market players' (ibid:13).

Key questions on alternatives to traditional intermediaries/ forms of supply to urban markets:

- To what extent do the alternatives to traditional intermediaries (contract farming, coops, etc.) play a role in urban food supply in case study locations?
- In particular, what progress have supermarket operations made in Nigeria and Zambia and what is likely to be their impact on producers, conventional traders and procurement patterns over the next decade?
- What are local attitudes to these various institutions?
- Is there a potentially larger role for any of these alternatives in urban food supply (given that the volume of food items the marketing system will need to handle over the next 20 years will be substantially larger - possibly double - current volumes)?

11. CONCLUSION: KEY QUESTIONS ARISING FROM THIS LITERATURE REVIEW

Our review has illustrated a wide range of organisations and institutions that are used to enforce regulations and create new opportunities. These can range from illegally based organisations through to formal and less formal organisations and relationships, and even norms and customs in a particular cultural context. The table below sets out a simplified framework for classifying these types of organisation (while recognising that formal and informal categories may overlap)

Formal	Informal	Cultural Norms
		
National Government	Traditional authorities	Customs and trading practice
Local Government	Trade Associations	Reciprocity
Parastatals	Community groups/CBOs	'Rules of the game'
NGOs	Community membership	
Unions	Trust based relationships	
Large-scale private sector firms	Youth vigilante groups	
Co-operatives		
Consumer groups		
Legal systems		

The literature review has also illustrated that our knowledge of the private trader component of urban food supply is rather stronger for Nigeria than for Zambia. But even in Nigeria, despite the presence of much detailed, if slightly outdated, empirical information on rural trade (much of which was conducted prior to the 1990s), there is clearly a shortage of specific knowledge and understanding of formal and informal market institutions and their impact on urban food systems today. This is lacking not just in Nigeria but across sub-Saharan Africa.

We list below some of the broad but key questions which need to be asked in sub-Saharan Africa. We began to address these, albeit in partial and summary form, in our scoping case studies.

Key questions on commodity chains/networks

- How do individual commodity chains work through from rural, peri-urban and urban producers to rural consumers?
- What are the implications for the livelihoods of the urban and rural poor?

Key questions on trader roles

- What roles are private traders currently playing in the urban food supply system in Zambia? What institutions and types of regulation shape their activities? [refer to gaps in the table]
- How are current trader patterns gendered in Nigeria and Zambia? To what extent does this gendering impact on formal and informal institutions? [refer to gaps in the table] What are the implications for gendered livelihoods?

- How does ethnicity shape current marketing patterns? Can excessive ethno-domination be mediated/regulated by formal/informal institutions?

Key questions on control of market space

- To what extent and in what ways is access to market space controlled in the case study markets?
- What are the consequences for individual trader and producer-trader types?
- Who is currently excluded and with what consequences?
- To what extent does central and local government currently regulate access to market space? With what consequences?

Key questions on market information

- What are the principal channels of information currently used by traders of different types in case study centres?
- How important are personal networks for information gathering?
- Are there specific information brokers? If so, how do they operate?
- How much use is made of government information outlets?
- What are trader perceptions of government information channels?
- If these were improved would they be used more? If so, how could they be improved?
- To what extent are mobile telephones used along different components of the marketing chain? What are the barriers? What is the future potential?

Key questions on credit provision

- What credit provision is available to key trader types along the urban food supply chain?
- What proportion at each level comes from formal as opposed to informal sources?
- What interest rates are applied?
- To what extent have microfinance schemes assisted in credit provision among the various trader groups?
- Can credit provision be improved? How?

Key transport questions

- How is the existing transport system organised to bring food supplies to urban case study centres?
- Who else may be able to provide transport but is not allowed access at present?
- What are the regulations and institutions (formal and informal) regulating access to fuel?
- What are the regulations and institutions (formal and informal) regulating access to routes and lorry parks?

Key questions on consumption

- What are the buying patterns of different types of consumers?
- Where do poorer consumers buy their food?
- What types of food do poorer consumers buy?
- What are the restrictions on poorer consumers in accessing lower-priced or better quality food?

- What progress have supermarket operations made in Nigeria and Zambia and what is likely to be their impact on consumers over the next decade?

Key questions on food safety regulation:

- Which government regulations in place in case study locations to protect consumers currently have any real impact on food safety?
 - Which regulations in place are enforced? Which are not enforced? Why not?
- How can enforcement of regulations be improved? (including trader and government perceptions)

Key questions on consumer associations:

- What consumer groups are operating in the case study locations?
- how do they operate and what do they do?
- What political representation is there for poorer consumers?
- Is there potential to increase their voice?

Key questions on central and local government roles:

- What is the current pattern and level of central and local government involvement in urban food supply, marketing regulation and facilitation in the case study locations?
- Is it sustainable?
- Is there potential to increase their involvement? In which areas?
- Is there need to reduce their involvement (i.e. reduce excessive regulation)?

Key questions around legislation:

- What are the laws and regulations
- How do they affect (positively or negatively) different groups (in particular urban and rural poor)
- How are these enforced (examples if known)?
- What restrictions are there on enforcing this law?
- What compliance costs?
- How do people get around it?

Key questions re standardisation of weights and measures:

- What types of weights/measurement are currently prevalent among different trader groups in the case study locations?
- What government legislation re weights and measurement is currently in place?
- To what extent is it enforced and with what consequences?
- How do different types of traders perceive the weights/measurement issue? How do regulators perceive it?

Key questions on trader associations:

- To what extent are trader associations active in the case study locations?
- What is their role?
- Do they improve the access of the urban poor to safe, cheap food? If not, why not?
- To what extent do they include or exclude informal producers?

- To what extent could they could be improved to provide a better service to urban producers, traders and consumers?

Key questions on pricing:

- To what extent does price setting among trader groups occur in the case study markets?
- What are the consequences for individual producer and trader types and for urban consumers?

Key questions on youth vigilante groups:

- How prevalent are urban vigilante youth groups in the study locations?
- What do they do?
- In what ways and to what extent do they improve or hinder food supply to the urban poor?
- In what ways and to what extent do their activities impinge on producers, specific trader groups and other stakeholders?

Key questions on NGO involvement:

- What is the current pattern and level of NGO involvement in case study locations?
- Is it sustainable in the long-term without large-scale subsidy?
- Is there potential to improve NGO/Local government collaboration?

Key questions on the role of traditional authorities:

- What is the current pattern and level of involvement of traditional authorities in marketing regulation and facilitation in the case study locations?
- Is it sustainable?
- Is there potential to increase their involvement? In which areas?

Key questions on the broader policy environment:

- To what extent does the current PRSP/IFI intervention take urban food supplies issues into account?
- What are the implications of the PRSP/IFI intervention for urban food supply?

Key questions on alternatives to traditional intermediaries/ forms of supply to urban markets:

- To what extent do the alternatives to traditional intermediaries (contract farming, coops, etc.) play a role in urban food supply in case study locations?
- In particular, what progress have supermarket operations made in Nigeria and Zambia and what is likely to be there impact on producers, conventional traders and procurement patterns over the next decade?
- What are local attitudes to these various institutions?
- Is there a potentially larger role for any of these alternatives in urban food supply (given that the volume of food items the marketing system will need to handle over the next 20 years will be substantially larger - possibly double - current volumes)?

Annex 1. NIGERIA AND ZAMBIA: BRIEF COMPARATIVE COUNTRY PROFILES

A1.1 Nigeria

Population size (2002): 132.8 million (World Bank in Nigeria data profile 2004)
Population annual % growth rate (2002): 2.2% p.a.
Population density: 120.10 per sq km (Euromonitor 2001)
Annual minimum wage 1999: \$300
Urban population: 36% (NDHS 1999, cited in Oxfam 2003); 46% (World Bank 2002, cited in Nigeria at a Glance, 2003). Rural poor: 56% (UNDP 1998)
Urban poor: 43% (UNDP 1998)
Largest city: Lagos (10 million and projected to be 3rd largest city in the world by 2015)
GDP p/c : \$385 (2004 estimate)
Life expectancy (2002): 45.3 years.
HIV/Aids prevalence: 5.8% (2001 estimate, Federal Ministry of Health, cited by Moran 2003)
Area: 923,773 sq km

Nigeria's prominence in Africa is guaranteed not least by the fact of its population: it is Africa's most populous nation – possibly one in five of all Africans is a Nigerian. Nigeria's recent economic history has been dogged by its dependence on oil (which constitutes around two-thirds of all government revenue and 95% of exports), the fact that oil wealth has been mismanaged, squandered, and stolen, and that agriculture has been neglected. There is consequently a massive external and domestic debt burden. These problems have been compounded by political instability, which is closely bound up with ethnic tensions: two-thirds of the period since independence (in 1960) has been spent under military dictatorship. Corruption, crime and violence are widespread.

Poverty rates are extremely high: one survey in 1996 put urban poverty at 58% and rural poverty at 70% and conditions are reported to have changed little since then (Okunmadewa et al. 2001: 112). There is substantial regional diversity: the north-west savanna region is estimated to have the largest percentage (40%) of the region's poor (Okunmadewa et al. 2001:87). Nonetheless, the same source notes Nigeria's 'most severe poverty lies across the southern regions of the country' (Okunmadewa et al 2001: 87). The paucity of accurate statistical data based on sound field data collection makes it difficult to assess the validity of such statements. Evidence from the studies in 8 urban and 8 rural communities across Nigeria conducted for this Voices of the Poor study (Okunmadewa et al. 2001) indicated that 'hardships had pulled everyone down' and that in all except a very few communities, poverty had increased greatly in the last decade (pp. 88,89). The growing incidence of HIV is one of the threats which looms on Nigeria's horizon: one in twenty Nigerian adults are already HIV positive (Moran 2003). However, it is important to note that there is also some evidence that in specific areas, under specific conditions, life has been perceived to be improving in recent years (see Porter et al. 2003 re positive change in fadama villages on the Jos Plateau 1991-2001, prior to the 2001 crisis.)

Pursuing this more positive theme, it is widely recognised that Nigeria has massive reserves of energy, enterprise, ingenuity and human resilience which have to be

balanced against the prevailing weak human resource capacity and weak public institutions (Foot 2003). The latest return to civilian rule in 1999 has led to renewed hope, although sporadic inter-ethnic and religious conflicts continue to raise substantial concern. Sectoral reform, including privatisation, are good governance programmes have been taken up since 1999 and GDP growth rate has increased from an average of 2.8% in the 1990s to 3.5% in 1999-2003 but, as the NEEDS (National Economic Empowerment and Development Strategy: Nigeria's domestic equivalent of the PRSP) team recognises, the challenges remain enormous. One of the greatest challenges is the rate of urbanisation, which currently stands at around 5.3% and is among the fastest in the world.

A1.2 Zambia

Population size: 9.337 million (2000 census)
 Population growth rate 1990-2000: 2.4% p.a. (current growth rate probably \leq 2%).
 Urban %: 36% (nb decline from 40% in 1980) [but estimated as 46% in Republic of Zambia (2002:3)]
 Urban/rural poverty profiles comparison:
 Zambia urban poverty = c. 56%, rural poverty = 83% popn (World Bank 2002); alternative data from IDS study for 1998: significant surge in urban poverty from 47% in 1991 to 65% in 1998; rural poverty drops from 89% to 77% (McCulloch et al 2000)
 HIV/Aids prevalence: 13% adult men 15-49, 18% adult women 2000; urban rates 26% women, 19% men 2000; rate for *pregnant* urban women 31% 2000)
 Largest city: Lusaka (population 1.1. million, 2000 Census)
 Life expectancy at birth 2000: 50.
 Adult life expectancy at age 15: 48 (decline from 59 in 1990)
 Under five mortality rate: 162 per thousand in 2000 (increase from 121 in 1980)
 Adult deficit in 2000 (number of additional adults in 2000 if mortality rates had remained at 1990 levels): 435,599
 Area: 752,616 km²

Although Zambia is not much smaller than Nigeria in overall area, a key geographical feature is that it is doubly landlocked. This renders it at a very severe comparative disadvantage in any international trading which, given current global economic parameters, is probably the country's most severe and virtually insoluble economic problem.

Zambia was part of the southern African regional colonial nexus whereby, in direct contrast to West Africa and Nigeria, the colonial imperative was to maintain white minority settler regimes and therefore to actively undermine, and frequently legislate against, indigenous peasant commercial agricultural production. This gave an essential protection to white commercial farmers who otherwise frequently could not compete with indigenous smallholders in traditional crops (eg maize) and, at the same time, encouraged or forced the development of a regional migrant labour system which was heavily institutionalised and the basis of the region's mineral, industrial and commercial agricultural development from the nineteenth century. Zambia was therefore a migrant labour economy, with massive flows to the Copperbelt and to other employment areas. African cash cropping was unimportant to the economy. Although the massive land alienations which occurred further south were avoided because there were not enough white settlers, the land that was alienated gave the commercial farmers an extremely significant comparative advantage over

smallholders as it tended to be well located along the line-of-rail which is the country's main transport route and contains all the main urban areas. The central significance of location in terms of commercial viability for agriculture in Zambia is explored further below.

Zambia's economy is still largely dependent on copper exports, as it has been since their discovery at the beginning of the twentieth century. After strong economic growth in the early years after independence (1964), copper prices collapsed (twice) in the 1970s. At the same time the country's essential import, oil, soared in price, and since then the country has been in economic crisis. The buying power of the country's exports reduced from an index of 100 in 1970 to around 14 in 1986.

The significance of Zambia's landlocked situation was highlighted from 1965 to the early 1990s as the entire southern African region was destabilised by the activities, direct and indirect, of its white minority regimes' attempts to hold on to power. A very particular target was the railway lines which were the economic lifelines of the central African countries and their natural transit route states, Mozambique and Angola. Very significant opportunity costs, amounting at times to significant proportions of annual GDP, were borne by these states during this period from having to use alternative routes and rehabilitate or develop others. The Benguela railway, which carried much of Zambia's copper at one point in the 1970s, is still not functioning. These external factors further contributed to the depth of the country's economic problems.

The economic situation has worsened during the 1980s and 1990s despite, or some would say because of, structural adjustment programmes. Deepening poverty has been reflected in serious increases in child mortality rates. Urban poverty has become so severe that, possibly uniquely amongst African countries, Zambia has experienced de-urbanization for the past two decades ie the urban share of its population is *decreasing* (Potts, forthcoming). [This may have also been the case in Nigeria for a short period in the mid-1980s though there is only anecdotal evidence to support the assertion: Nigeria's census data are notoriously unreliable.]

Zambia has abundant land resources and fairly high agricultural potential in comparison to its neighbours (eg Malawi and Zimbabwe). However its agriculture is essentially rainfed in a mainly dryland context and, in the disequilibrium climatic environment of the southern African savannahs, this means it is highly variable in its output. In the absence of massive investment in irrigation, this is another essential economic 'given' which is indifferent to policy, which needs to be placed alongside its landlocked state. By far the most important factor influencing annual variability in overall arable output is rain. The rains fall between November and April; the rest of the year is completely dry and nothing can be grown except with irrigation. Average rainfall is higher in the north of the country. There are very extensive micro-scale irrigation resources (dambos) used by smallholders throughout this region, including Zambia. These are seasonally waterlogged areas at the heads of stream catchments and are used to grow a host of critical food supplies in the dry season. For example, many of the vegetables traded by smallholders throughout this region come from dambo cultivation. Large scale irrigation is mainly confined to some large-scale commercial farmers.

Another essential economic feature of Zambia is that it has a very small population in relation to its size (still under 10 million in 2000). Population densities in many rural districts are very low. Also very large numbers of smallholders are very far away from any concentration of population which might act as a market for their produce. Zambia's average population density in 2000 was only 13 people per square kilometre. Only in its two most urbanized provinces, Lusaka and the Copperbelt, did average densities exceed 19 per square kilometre, and in four out of its nine provinces, which covered two-thirds of the country, average densities were between 5 and 11 per square kilometre (Republic of Zambia 2003). By contrast, some of the less densely populated parts of Nigeria in the north-east of the country were already estimated to have a population density of 30 per square km by the 1960s and early 1970s. This has important implications for rural development, and general service provision, including transport services.

The result of liberalisation in Zambia has, so far, been a reduction in agricultural output (eg Jayne et al 1999; Zulu et al 2000). This has particularly been true of maize which is the country's essential staple which dominates the agricultural scene. There has been some diversification into other crops, of which cassava has been most significant in volume and food terms (IDL 2000), but the data show clearly that the net effect on output, particularly of smallholders, so far, has been negative. The large, commercial farms have fared much better, with significant gains in the production of sugar, wheat, cotton, horticulture and floriculture (IDL 2000). The main features and causes of this are neatly summarised by Seshamani (1998) who is a proponent, not a critic, of liberalisation: *'The main hypothesis .. that seeks to explain the decline in production is that the small farmer has experienced difficulties in accessing adequate and timely inputs in marketing his [sic] produce and in getting a fair price for his produce. While the aim of liberalisation is to ensure remunerative prices for the producers not guaranteed by fixed pan-territorial prices, it is mainly the large farmers who seem to have experienced this anticipated benefit. For the small farmer in the remote rural areas, the experience has been the reverse. His[sic] income as a result has been lowered and given that poverty in Zambia has already been concentrated in the remote rural areas, this situation is bound to worsen poverty and income inequality..... one strongpoint about the previous regime was a well established and elaborate network that existed for the distribution of inputs and outputs even in the remotest parts of the rural areas'*. The constraints discussed above relate to the geography of the internal food market in Zambia.

Another important factor that will soon start to have a significant influence on the urban food marketing system is the most recent Zambian government agricultural programme - the Agricultural Commercialisation Programme (ACP) 2002-2005. One of the ACP's premises is that the Zambian local market is too small, and has such low purchasing power, that only modest increases in production can, in any case, be absorbed (Republic of Zambia 2001: 28). Poverty is thus also a significant challenge for Zambia that is both a constraint to the urban food marketing system, and a result of it. This is thus also identified as an area for further research.

Another essential feature of contemporary Zambia is a high rate of HIV prevalence. Although this now appears to have stabilised, and may be falling among the youngest sexually active age groups, illness and deaths among the economically active population is creating serious problems for economic productivity in all economic

sectors. The recent food crisis in the region when the rains failed in 2001/2 is now clearly recognised to have been exacerbated by the impact of HIV/AIDS in smallholder agricultural communities (SARPN 2003).

Zambia is currently ruled by the MMD (Movement for Multiparty Democracy). The current President is Levy Mwanawasa. The MMD took over from UNIP in 1991 when the country reverted to multi-party rule after decades of one-party rule. UNIP, under Kenneth Kaunda whose political roots dated back to the anti-colonial, liberation movements, had resisted structural adjustment, despite its inevitability once the country became heavily indebted. More than one attempt to introduce SAPs had occurred in the 1980s but many of the policies were either not implemented or were withdrawn due to political resistance. Under UNIP the country had adopted many of the policies typical of post-independent Africa, and had nationalised much of the economy, including the mines. Zambia had a particularly dominant parastatal sector which was frequently heavily indebted. The MMD, under Chiluba, previously a trade union leader, implemented most aspects of SAPs quite quickly. However, in the agricultural sector, there has been some vacillation with the government intervening in key areas as the 1990s wore on. The government argues that this was necessary to maintain the rudiments of food security because the private sector was not fulfilling critical roles; their critics counter-argue that the interventions prevent the private sector developing these roles. Chiluba is currently under investigation for corruption.

An enduring myth about Zambia is that it was a key exemplar of urban bias in government policies and that this helped to explain the poor performance of the agricultural sector. In fact, as its experience of de-urbanization indicates, this is erroneous and has led to much confusion. While copper has been, and is, the mainstay of the economy, the UNIP government did implement policies to encourage agricultural development. These were quite successful in the 1980s and output trends were encouraging (Loxley 1995) although, as always, the key determinant of annual production was rainfall. The period has even been deemed similar to the agricultural 'revolution' which occurred in that decade in Zimbabwe although this is probably an exaggeration. Nevertheless the government was allocating resources to the rural majority in an attempt to boost their productivity. It also subsidised food prices for the urban poor - the key issue which is always cited as evidence of neglect of rural development. In fact, the government was attempting 'development' on both fronts but, in both cases, its policies were economically unsustainable.

A1.3 Nigeria and Zambia: key differences

The key differences between Nigeria and Zambia are very important. Zambia is landlocked and thinly populated. Nigeria has a coast and has Africa's largest population (perhaps 12-14 times the size of Zambia's). It thereby avoids some of the essential economic geographical constraints that face Zambia in terms of agricultural market development. Even Nigeria's most thinly populated areas are more densely populated than the vast majority of Zambia. Their agro-ecological conditions are fundamentally different. Zambia has one rainy season and the rains are extremely variable in total and over the season. The riskiness of arable agriculture in Zambia is far higher therefore than in much of southern Nigeria, though not dissimilar to the northern half of Nigeria. Nigeria had decades of colonial development which focussed on peasant agriculture (for export) while Zambia experienced the exact opposite - the active underdevelopment of indigenous smallholder entrepreneurialism.

On the other hand Zambia has been politically 'stable' since independence. It has experienced no successful coups. It does not face ethnic problems on the scale of Nigeria's. The principal economic feature they share is that their economies are very dependent on foreign exchange derived from mineral extraction

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